ADF

Saskatchewan Agriculture
Development Fund

Final Report

V-89-09-0240

A Feasibility Assessment of the Saskatchewan Wild Food Industry

Conducted by
Northern Harvest Enterprises Ltd.

Funded by the Agriculture Development Fund

Keeping the agriculture and food industries competitive through Research, Development and Demonstration.

WILD HARVEST

A Feasibility Assessment of the Saskatchewan Wild Food Industry

A Project Funded Jointly by the

Saskatchewan Agriculture
Development Fund
Project V-89-09-0240

and

Saskatchewan Economic Development and Tourism

Northern Harvest Enterprises Ltd.
Box 562
Regina, Saskatchewan
S4P 3A3

93-02204/

"Wild Harvest"

A Feasibility Assessment of the Saskatchewan Wild Food Industry

ABSTRACT

Research and development of wild foods in northern Saskatchewan has been actively promoted and heavily funded during the past five years. This study examines the economic feasibility of the "wild food industry", particularly wild berries. The size and reliability of supply, resource costs, processing costs and market considerations are addressed.

The report concludes that high input and production costs seriously limit the economic feasibility of wild foods, whether in fresh or processed form. It is recommended that further development of wild or cultivated native food projects be preceded by a comprehensive economic analysis.

Wild Harvest

A Feasibility Assessment of the Saskatchewan Wild Food Industry

TABLE OF CONTENTS

	Page
Introduction	1
A. The Resource Base	3
B. Price Analysis	9
C. Markets	12
D. Production Costs	14
E. Packaging, Presentation and Promotion	17
F. Investment in the Wild Food Industry	20
G. Conclusions	21
H. Recommendations	22
Appendices	
Bibliography	

Northern Harvest Enterprises Ltd.
P.O. Box 562
REGINA S4P 3A3

"Wild Harvest"

A Project Funded Jointly by the Agriculture Development Fund and Saskatchewan Economic Development and Trade

FINAL REPORT

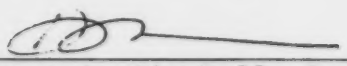
> The need for economic information for marketing food products is widely recognized. It is viewed as the lubricant for the wheels of industry whether for making farming decisions, product marketing decisions by processors or capital investment decisions by individuals and businesses.
>
> When the amount, timing or accuracy of economic information is inadequate, there are often costly misallocations of resources. As the quantity and quality of economic information increases, uncertainty diminishes, and the decision-making process is enhanced. (Dahl and Winchell, 1984)

At the time the "Wild Harvest" proposal was formulated, it was felt that major obstacles to the development of a wild food industry in Saskatchewan lay in the area of marketing. Restricted product lines, poor packaging, and lack of effective advertising and promotion were felt to be the major "culprits" inhibiting industry expansion.

As the project proceeded, however, other concerns have emerged to accompany, and indeed supersede, marketing issues. These concerns relate to the nature of the wild resource base itself, as well as to the systems (or lack of systems) for harvesting, financing, handling and transporting the crops of berries, mushrooms or other products. Processing raises yet another range of concerns, including the fundamental question as to whether Saskatchewan can produce products at a competitive price without substantial and continuing government support.

Because of these concerns, the "Wild Harvest" project has reduced its emphasis on marketing issues (i.e. presentation, packaging and distribution) and increased its focus on matters concerning the wild resource base and the issue of processing costs and organization. The question of incorporating craft products into wild food gift formats has also been largely deleted from the project as being a premature consideration. It is hoped that this change of emphasis will help provide some of the basic "economic information" which would assist industry and government in the decision-making process.

Submitted by :



Darcy A. Mitchell, President
Northern Harvest Enterprises Ltd.

A. The Resource Base

With the exception of wild rice, the "wild food industry" in Saskatchewan today remains largely a continuation of the traditional practice of selling berries and other foraged products which are surplus to the harvesters' domestic requirements. As an economic activity, berry picking, gathering mushrooms, and collecting medicinal herbs and roots have generally been small-scale seasonal sources of income for individuals with a marginal attachment to the labour force - especially older women and children. From time to time, if prices are high enough, other individuals may enter the market. This was the case in the short-lived mushroom boom south of La Ronge in 1987. It is safe to say however, that very few people would give up their jobs to become berrypickers or mushroom hunters. For the most part, wild foods have served to replace store-bought food and the harvesting activity itself has been at least partly social and recreational in nature.

This study focuses on the wild berry resource. Northern wild berries have received the most development attention and have the clearest market acceptability of the various wild crops, except for wild rice. References are occasionally made to wild rice. This crop, and the manner in which the wild rice industry has developed, are sufficiently different from the rest of the "wild harvest", however, that the conclusions of this report may be of limited applicability.

Detailed discussions of supply and price are generally confined to wild northern blueberries, as sufficient data are not available for other species. Where appropriate, conclusions have been extrapolated to other wild foods.

A.1. Available Species

Numerous species of wild fruits, mushrooms, herbs, and other edible or useful wild plants grow in Saskatchewan, but relatively few are harvested in quantity for sale. In the south, saskatoons, chokecherries and highbush cranberries are the major fruits sold in farmers' markets. In the north, blueberries and to a lesser extent, dry ground cranberries are picked for sale. Other berries which are sold from time to time, either fresh or as jams and jellies, are pincherries, raspberries and strawberries. Currants, wild plum, elder, buffalo berries, cloudberries and cactus fruit are of marginal interest as they are either limited in their range, rare, difficult to harvest, or unpleasant in taste.

Several varieties of wild mushrooms grow in Saskatchewan including chanterelles, morels, boletes, false morels, and pine mushrooms. Wild mushrooms are extremely susceptible to weather conditions, particularly drought. Many consumers (and potential harvesters) are suspicious of wild mushrooms; they are rarely if ever found at roadside stands or farmers' markets.

Other wild plants with a possible market potential are wild mint, cattail, fiddlehead (ostrich) fern, wild onions, and wild mustard, and a variety of edible "weeds" such as lambsquarters and burdock. Although these species are not discussed in detail in this report, the conclusions regarding supply, marketing and other issues likely apply to an even greater degree in the case of these more unusual "crops".

A.2. Estimated Supply

A.2.1. The North

The blueberry harvest in northern Saskatchewan has been monitored, primarily by Kalya Brunner, since 1985. She has also estimated mushroom crops for 1987 and 1988, and the approximate annual harvest of other fruits.

Estimated harvest figures for the north are as follows:

Species	1985	1986	1987	1988	1989
	(quantities in pounds)				
Blueberries	3,000	1,500	27,000	55,000	5-10,000
LowBush Cranberries	?	9,000	3,600	?	? (poor)
Mushrooms (all species, mainly chanterelles)	1,500	3,000	65,000	10,000	? (poor)

Estimated annual harvest of other species is as follows:

Species	Quantity in Pounds
Highbush cranberries	5,000
Bog cranberries	1,000
Raspberries	3,000

Species	Quantity in Pounds
Strawberries	1,000
Chokecherries	5,000
Pincherries	2,000
Currants	1,000

A.2.2. The South

Farmers markets in Saskatchewan were contacted in an effort to obtain an estimate of the amount of wild fruit sold in the province. As the markets do not maintain records of this type, an estimate could not be obtained. It was found, however that one or a few members of nearly every market sell wild fruits, usually saskatoons, chokecherries and/or highbush cranberries. A greater variety of fruits are sold at the more northerly markets where the habitat is suitable for more species.

Southern Markets (Sixteen markets surveyed)

Species	Number of Markets
Saskatoons	10
Chokecherries	8
Pincherries	2
Cranberries - High Bush	1
Blueberries	1

Northern Markets (Twenty-one markets surveyed)

Species	Number of Markets
Saskatoons	8
Chokecherries	8
Highbush Cranberries	10

Species	Number of Markets
Blueberries	8
Pincherries	3
Lowbush cranberries	5
Wild strawberries	1

NOTE: a. unable to contact Shaunovon, Southey, Moose Jaw, Yorkton, Ft. Qu'appelle and Kamsack

b. Several respondents noted that product quantities have declined as a result of the drought. Many of them said they could easily sell blueberries if the product could be brought in more readily from the North.

c. Products are sold in both raw form and as jams, jellies, syrups and juices.

A.3. Potential Supply

A.3.1. The Case of Wild Blueberries

Efforts have been made to estimate the potential supply of wild blueberries in the north. Based on three large forest fire burns (Elk Lake north of La Loche, McKenzie Burn south of La Ronge, and Elain Burn, Hanson Lake Road), K. Brunner has estimated a potential yield of 47.3 million pounds of berries per year based on a yield of 200 lb. per acre. With the addition of half a square mile of harvest area for each linear mile of northern road, with each acre yielding 100 pounds, the potential rises by 16 million pounds per year, for a total of 63.3 million pounds. Similar calculations based on suitable habitat could, presumably, be made for cranberries, saskatoons, chokecherries and other fruits.

Unfortunately, such calculations are extremely misleading. The issue to be addressed is not the quantity of berries growing in the wild, but the potential economic resource, i.e. the quantity which can reasonably be expected to be harvested for sale. To determine this amount, consideration must be given to the availability of labour to harvest the crop, harvesting

costs, the ability of local purchasers to absorb large quantities of berries, adequacy of storage and shipping facilities and, ultimately, the size of the market willing to purchase the crop at the price required to provide an acceptable return to harvesters, wholesalers, shippers, retailers and all others through whose hands the berries must pass on their way to the ultimate consumer.

As a result of dedicated field work, the northern berry harvest has shown significant gains in the past five years. The largest quantity ever produced, however, was only 55,000 pounds, and there have been two almost complete crop failures in the same five year period. Wild crops, especially in less than optimal habitat, are notoriously fickle.

Even in a "good year", harvests will be far less than the theoretical maximum. Based on the consultant's observations and on the extensive field experience of Kalya Brunner, it is estimated that an experienced picker averages about 30-40 pounds per day. Normal blueberry season is 3 weeks. Estimates of "regular" pickers, most of them older women and their grandchildren, range between 200 and 400.. If the larger number of pickers (400) picked 35 pounds per day every day of the season, the <u>total harvest</u> would amount to 294,000 pounds, a minute fraction of the "theoretical maximum".

The reasons for the relatively few people who go out to pick berries are quite simple - the return to labour is dismally low, the work is seasonal, and the current storage, purchasing and distribution system is such that pickers cannot be sure that their produce will be purchased from them.

The gross returns to an individual picking 35 pounds of berries per day @ $1.50 per pound would be $52.50. After deducting costs for gas (some pickers travel up to 90 miles to pick) and spoilage (conservatively estimated at 12%), the return would be reduced to between $30 and $40.00 per day. As pickers frequently work a 10-12 hour day, this would result in a return to labour of between $2.50 and $4.00 per hour. In a "bad year" the return would be much lower as pickers must scout farther to find patches, and pick fewer berries per patch. It appears, in fact, that in a less than optimum year, pickers will not pick at all, or only for their domestic requirements. Travel time, gas costs, and time wasted in moving from patch to patch are simply too great in a poor year.

The problem of a low daily return is compounded by the shortness of the season. Brunner indicates that the average picker goes out for 6 days, generally at weekends when transportation is more readily available. Even in a 10-day period, pickers would earn only $300-$400 dollars. As many of the pickers rely on social assistance, most of these earnings, if reported, would be deducted from their welfare cheques.

In short, people who pick berries are those who can find no other employment.

Even though successful efforts have been made to develop a berry depot buying system in the north, pickers find quite frequently that buyers are not immediately available for their product. Without guaranteed markets, pickers are unlikely to increase their harvesting efforts beyond the quantities they have been able to sell in the past. Most of the buying depots are small stores with limited storage facilities and cash reserves. The cash problem can be a serious one in a region poorly served by financial institutions. Where can a store owner in La Loche obtain $1200 in cash on short notice if twenty pickers show up with forty pounds of berries each?

Cash and storage problems at depots are compounded by an inadequate and irregular northern trucking system. Berries that have sat in a warm shed for three days waiting for a truck will not, obviously, be in prime condition for the market.

A further difficulty is that, even though prices paid to Saskatchewan harvesters are extremely high relative to national standards (e.g. the rates paid to pickers in the Maritimes and Newfoundland), they would likely have to increase if pickers must range farther afield from their communities to increase the harvest. In fact, a large percentage of the most prolific habitats - burns - are virtually inaccessible; there are no roads into them. Thus the more normal situation of increased supply resulting in lower prices might be reversed: to obtain more supply, prices might have to go up. (See Appendix A - Harvester Survey)

A.3.2. Other Species

The situation described above would apply to a greater or lesser degree to all wild crops - more so to unusual crops such as fiddlehead ferns which are not well known to local people. Southern crops such as saskatoons and chokecherries may be somewhat less problematic, as they can be found closer to population

centres, but the saskatoon crop, in particular, is extremely unpredictable. There is little information available on southern harvesters, but a survey of farmers' markets suggested that they are almost always women.

The consultant's personal experience suggests that an individual can pick about three pounds of saskatoons an hour in a reasonable patch. Chokecherries are more productive and the crop is more predictable. Pincherries are comparatively rare and the crop is more sparse than either chokecherries or saskatoons. Based on eight hours of picking and allowing for an hour's drive each way to the harvesting area, an individual would have to sell saskatoon berries at about $2.35 per pound to earn minimum wage and cover the cost of gas and basic packaging materials. This price allows nothing for cleaning the berries, marketing and selling costs, nor time spent searching for berry patches and travelling from patch to patch. In the case of a picker harvesting, cleaning, and packaging her own berries and selling them through a farmer's market, the price paid per pound would have to cover not only the labour of picking, but the time spent selling the product at the market. In these circumstances, a price per pound of $2.35 would result in a return to labour well below minimum wage.

One wild fruit which may be an exception to the above is the highbush cranberry, which is most common in the eastern parklands and forest fringe. Brunner estimates that pickers can gather up to 40 pounds an hour of this fruit. Unfortunately, there is no fresh market for highbush cranberry and it has a strong odour when the berries are processed into juice or jelly. There does however seem to be some unexplored potential for this prolific wild crop.

B. Price Analysis

B.1. Blueberries

B.1.1. Fresh Market

The highest profit margin for produce is generally in the fresh market. If a product cannot be supplied profitably to the highest paying market, its potential in other (industrial) markets is likely to be severely limited.

A 1985 NEDSA study carried out by N&G Carle concluded that a selling price of $2.00 per pound did not cover the costs of cleaning, packaging and transportation to market, when

harvesters were paid $1.50 per pound for wild blueberries. Actual prices paid by consumers have varied between $2.25 and $2.75 per pound. The approximate breakdown of this price would be:

Price paid to harvester	$1.50	
Loss (spoilage)	.18	(12% of cost)
Cleaning - labour only	.25	(at $5.00/hour)
Packaging	.10	
	$2.03	
Margin available for storage costs, shipping, advertising & promotion general overhead, spoilage during shipping, spoilage of unsold product, financing costs and profit	22 - 72 cents	
	11 - 26% gross margin	

Even at the higher selling price, there is virtually no margin for profit in the sale of berries purchased at $1.50 per pound. This price also assumes no retail markup. At the average retail markup on fresh produce of 30%, the price to the consumer, based on the harvester's return of $1.50 per pound would range between $3.46 and $4.23 per pound.

The major western competitor to fresh wild blueberries is B.C. domestic blueberries. The wholesale price of B.C. berries in 1 pint containers (about 3/4 lb.) ranges from $2.32 per pound (McDonald Consolidated) to $2.05 per pound (Scott National). Retail prices in season are approximately $3.00 - $3.50 per pound. A market survey carried out by Saskatoon's Food Focus consulting group indicates, however, that fresh fruit accounts for only about 10% of blueberry sales. Most outlets (retail, restaurant and institutional users) want the berries in frozen form or as pie filling.

At current prices, wild blueberries appear to be competitive in the fresh fruit market if suppliers are willing to accept very low margins and are willing to achieve their returns in the form of wages rather than as profit. There is very little if any room for "middlemen" in the process.

B.1.2. Frozen Fruit

The wholesale price for frozen domestic blueberries (by the case) ranges from $1.66 per pound (in 2 kilogram bags) to $2.54 per pound (in 300 gram bags). The "consumer ready" frozen

format is thus, somewhat more expensive than the fresh product, although the institutional pack is considerably cheaper. In neither case, however, are wild blueberries competitive at current prices. Even the institutional package would require labour and equipment to produce - and prices are only about 11% higher than the harvester's price. Unless production of the consumer pack could be "piggybacked" on an existing process with virtually no incremental cost other than labour, the Saskatchewan crop could not compete. Even in these circumstances, profitability is doubtful.

In the frozen market, there is an even closer competitor to Saskatchewan fruit than B.C. berries - wild berries from the maritimes. These are available in 30-lb. pails for $2.16 per pound. This price is based on an average price to pickers of less than 50 cents per pound.

B.1.3. Jams and Jellies

Given the comparison between fresh fruit price and institutional frozen packs, it can be assumed that bulk purchases for jam and jelly manufacture would require a yet lower price. The bulk price for domestic blueberries in B.C. is, for example, $1.25 per pounds, less than the price paid to Saskatchewan harvesters. It should also be noted that this is one of the highest cost fruit input for B.C. processors.. Other fruits, such as peaches at about $.55 per pound, help offset this cost, as each type of jam regardless of the fruit base, normally sells at the same or similar price. A more detailed discussion of processing costs in jam production is contained in Section D - Production Costs.

B.2. Other Species

The prices charged at farmers markets for saskatoons, chokecherries and fruit jams, jellies and syrups vary widely. Comparisons are rather difficult, as product is sold in several formats, ranging from pint berry baskets to one gallon ice-cream pails. The following gives some idea of price variability:

Fresh Saskatoons

One gallon pail	$3.50 - $10.00 (.58 - 1.66/lb.)*
Per Pound	$1.00 - $5.00
Per Pint	$2.00 (2.66/lb)

*assumes one pint equals .75 pound and one gallon equals 6 pounds.

Fresh Chokecherries

One gallon pail	$3.50 - $6.00 (.58 - 1.00/lb)

Saskatoon Jam/Jelly

Small (assume 250 ml. jar)	$2.00 - 3.00/jar (generally $2.50)

Chokecherry jelly/syrup

Small jar	$1.50 - $2.50

Pincherry jelly

Small jar	$2.50

Prices are not available for other fruits and fruit products.

Based on current prices, the supply of wild berries in southern farmers' markets can be justified only if the suppliers enjoy the activity of picking and selling berries for its own sake and/or place little or no value on their labour. Depending on the cost assigned to the fruit input, jams and jellies may provide a better return to the home producer. (See Section D - Production Costs)

C. Markets

No statistics are available on the domestic consumption of wild fruits per se, but the following data are indicative of trends.

- domestic production of fresh blueberries (wild and cultivated) has increased from 8.85 kilotonnes in 1960 to 22.43 kilotonnes in 1986. Most of this production is frozen. Per capita consumption in 1986 (fresh product) amounted to .23 kilograms.

  Per capita consumption applied to Saskatchewan - 230,000 kilograms or 506,000 pounds

- Per capita consumption of fresh cranberries increased from .11 kilograms in 1960 to .46 kilograms in 1986.

  Per capital consumption applied to Saskatchewan - 460,000 kilograms or 1,012,000 pounds

- Per capita consumption of all fresh fruit has increased from 53.84 kilograms in 1960 to 62.66 kilograms in 1986. Between 1960 and 1978 (latest figures available), consumption of jams and marmalades dropped from 2.91 kilograms per capita to 1.72 kilograms - a decline of over 40%.

Market trends are clearly toward higher consumption of fresh fruit and lower consumption of sugar sweetened foods. At the same time, there is growing interest in organic, imported and other "specialty items", including calorie reduced or "whole food" substitutes for traditional sweets and condiments. In 1986, for example, imports of jams, jellies and marmalades jumped from 2.90 kilotonnes in 1980 to 6.82 kilotonnes in 1986. Exports of these products declined slightly in the same period of time. In the absence of domestic production or consumption figures for 1986, it is impossible to know whether this rise in imported jams represents an increase in consumption, or simply a replacement of domestic products in a still declining market. There does, however, appear to be some potential for import replacement of "specialty" products, at the right price. (Appendix B - Production and Consumption Data)

C.1. Fresh Market

Based on current production levels and costs it would be extraordinarily difficult for Saskatchewan to compete in the extra-provincial fresh fruit market. Within Saskatchewan, however, there appears to be a considerable demand for fresh wild berries if they can be supplied to the consumer at competitive prices.

In past years, for example, one or two pickers have sold 6,000 pounds of blueberries annually in the Prince Albert Farmers Market. In 1989, Regina's Youth Unlimited pre-sold over 20,000 pounds of fresh berries, although the sales could not be realized due to crop failure. At a price of $2.50 - $2.75 per pound, it is likely that up to 100,000 pounds of berries could be sold annually through farmers markets, roadside stands, and charitable groups such as Youth Unlimited. If prices could be reduced to approximately $1.70 per pound delivered, retail and institutional markets could be tapped. (See Appendix C)

C.2. Frozen Market

Most of the Canadian blueberry crop is sold frozen. Except for direct sales of bulk frozen berries to consumers, Saskatchewan cannot compete at current price levels.

C.3. Specialty Jams and Jellies

There is a huge variety of specialty jams, jellies, and preserves on the market. A sampling of these products reveals that the commonest package sizes are 125 ml. and 250 ml. Prices for the 125 ml. size range from $1.45 to $2.00 wholesale. For the 250 ml. size, prices range from $2.25 to $4.17 wholesale. The commonest wholesale price for the 125 ml jar is $2.00. The 250 ml. jar generally wholesales for about $3.00 - $3.25. Given the variety and quality of gourmet products on the market, it should be assumed that Saskatchewan would be a price taker in this market and should not expect a significant premium, if any. (See Appendix D for price survey)

Saskatchewan's competitive position in the gourmet jam/preserve market is discussed further in Section E - Packaging and Presentation.

D. Production Costs

D.1. Commercial Production

The original premise of this study was that by adding value and combining a variety of wild food-based products in a single marketing effort, the feasibility of the wild food "industry" could be enhanced. It quickly became clear, however, that the first step in this process was to determine the difference between direct costs of production and market prices to determine what margin, if any, existed for out of province marketing efforts. Without development of a detailed business plan, which was beyond the scope of this study, it was necessary to estimate the costs of producing, for example, a jar of wild blueberry jam as a proxy for the costs of other wild food products. The following estimate is based on a combination of information provided by the Manitoba Food Products Development Centre, Len Filek, Plant Manager, Summerland Sweets, and Bernie Zuk, Saskatchewan Research Council.

a. Base Estimate

Based on an input cost of $1.75 per pound for wild blueberries, Summerland Sweets could produce a 250 ml jar of jam for $1.64. Fruit costs would represent 54% of the total cost or $.89 per jar. This is equivalent to about .5 lb. of fruit per jar or about 1 lb. of fruit to produce 1 lb of jam. Summerland uses a higher than required proportion of fruit to sugar which accounts

in part for the weight of fruit. However, it should be noted that about 20% loss in weight can be expected from the ingredient mix to the final product.(Bartholomai, p. 35) Almost all of this loss would be evaporation loss from the fruit, so that the actual loss in fruit weight would be closer to 40% even at a 50/50 fruit/sugar proportion. As many gourmet jams and preserves also use a high proportion of fruit to sweeteners, the fruit cost identified by Summerland represents a reasonable estimate for the fruit input.

b. Adjustments for Direct Costs

Input costs other than fruit are higher in Saskatchewan than they would be at, e.g. Summerland Sweets, largely because of low demand and transportation costs. Jars are double or more than double (at 40-60 cents per jar compared with 19-20 cents), labels are estimated at 6-8 cents per label,(compared with 4 cents) and other inputs such as sugar would also be more expensive.

If a differential for jars (30 cents) and labels (2 cents) only is added to the base estimate, the cost per 250 ml jar rises to $1.96 per jar.

c. Adjustments for Labour and Indirect Costs

The costs identified above have not been adjusted for differences in overhead costs. Summerland Sweets, for example, produces about 7000 jars of jam per year in a 15-20 day period. At other times, most of the same equipment is used to produce syrups and candies. Summerland allows $.08 per jar for overhead costs, including depreciation, management and other indirect costs. If the equipment were used only for the jam operation, overhead would, obviously, increase dramatically, as the total allocation for overhead in the jam-making operation is only $560 per year, based on 7000 jars. The plant's equipment includes conveyer lines, a capping machine and other technology which could not possibly be supported by the overhead allocation of 8 cents per jar.

It is unlikely that a Saskatchewan operation producing an equivalent quantity of jam would be equipped with equally efficient equipment. At 8 cents per jar, it would take 3-4 years to pay off even a kitchen range and two freezers for fruit storage. A small scale jam maker in Regina (Gloria's Low Sugar Jams and Jellies) estimates that it would cost $25,000 to equip their home basement to federal standards, allowing for sales outside the province. At 8 cents per jar, it would require production of 31,250 jars per year for 10 years to write off this investment, not counting an imputed rent for the building itself.

Using the $25,000 figure given above, allocations for overhead would be increased by a factor of at least 4.5, or an additional $.20 - $.25 cents per jar, based on production of 7000 jars per year.

The productivity of labour without equivalent technology is another factor which is likely to increase Saskatchewan production costs above those experienced at Summerland Sweets.

As Summerland Sweets calculates labour costs on an average of $8.50 per hour, no adjustment has been made on the assumption that lower Saskatchewan costs would offset losses in productivity. This is probably an unduly generous assumption.

Estimated cost after adjustment for overhead - $2.21

d. Transportation

The cost of $1.75 per pound for berries assumes that the product is manufactured close to the source of supply, e.g. in La Ronge. If this were not the case, the price for berries would be higher by at least 15-20 cents. Alternatively, the product would have to be shipped to other centres for sale or transhipment. In the latter case, shipping from La Ronge to Regina, for example, would add about 12 cents per jar, for a revised cost of $2.33. Production in the north would also be more costly as a result of higher utility costs and costs for inbound transport of jars, sugar, and other production inputs. Adding 10% for a "northern factor", the price per jar goes to $2.56.

e. Margin for manufacturer's marketing, advertising, and promotion, insurance and financing costs, and profit

Filek states that a minimum gross margin of 35% is necessary to provide for the above costs and a small profit. This margin would result in a wholesale cost of $3.94 or .75 to $1.00 more than the average wholesale cost of specialty jams, jellies and preserves surveyed in this study.

f. Adjustment for smaller product sizes

Manufacturers frequently produce specialty jams in smaller sizes, for example, 100 - 125 millitre jars. The price paid for jams in these smaller formats is higher on a per millilitre basis. Production costs are, however, higher still, as the only significant cost reductions occur in the amount of fruit

and sugar used, and a somewhat lower shipping cost per jar, due to a lower weight. In other words, it takes about as long to cook, fill, label and pack a 125 ml jar as it does at 250 ml. jar, and there is little difference in the cost of the jars. While the smaller jars may be produced at about a 25% reduction in cost, the price for the smaller jars is about 33% less than the larger format.

On this basis, a 125 ml. jar of wild blueberry jam would cost about $2.59 to produce, while competitors' products wholesale at about $2.00.

The above calculations are, of course, somewhat speculative and require detailed verification. The fact remains, however, that the costs of processing an expensive wild product in small quantities in a location far from major markets, without local suppliers of critical inputs such as jars, must necessarily be extremely high. It may be possible to reduce costs such as marketing and promotion by joint efforts with other producers, but it is not at all clear that there is <u>any</u> available margin to support <u>any</u> marketing efforts. Looked at from another perspective, if every pound of blueberries picked in 1988 were made into jam at the rate of 1 lb of berries per 1.25 pounds of jam, <u>the total available margin above estimated direct production costs would be about $30,000.</u>

D.2. <u>Home Production</u>

From the point of view of the home producer, making a few hundred jars of jam for the farmer's market or for sale through other local outlets, may be quite attractive. The berries are probably picked on weekend outings, the jam is made in the home kitche, and the only cash outlays are for jars, lids, sugar, perhaps pectin and few spices, blank labels, and gas. For a direct outlay of $1.00 a jar, the home producer can realize a "profit" of $1.00 - $2.00.

<u>If no value is attached to labour, and no significant costs are incurred in marketing and selling, the production of wild berry jams and jellies for local sale is quite feasible.</u> Under other circumstances, the feasibility of a processing industry relying on wild fruits or other wild products is highly questionable.

E. <u>Packaging, Presentation and Promotion</u>

E.1 Packaging and Presentation

E.1.1. The Competition

Saskatchewan wild berry jams may be the only Saskatchewan wild berry jams in the world, but they are certainly not the only competitors in the high-priced jam and preserves market. Appendix E shows a small collection of advertisements for products in competition for the gourmet market. A stroll through Eatons at Christmas time, or a visit to specialty food stores in Vancouver or Banff souvenir shops will reveal a vast array of beautifully packaged products competing for the high margin specialty trade.

The mail order food business is larger yet, as the advertisements in Gourmet magazine will attest. A 1983 edition of The Mail Order Gourmet lists 31 U.S. companies selling "sweets and treats" by mail. A number of American companies, such as American Spoon Foods of Michigan, carry several wild fruit products and some companies specialize in organically grown or low sugar jams and preserves. In Canada, P.E.I. Preserve Company, WildWood Treats, Trotman's Food Specialities, and Au Printemps Gourmet, among others, include wild fruit products in their product line.

Even though the market for jams and jellies, per se, appears to be shrinking, the specialty food market is not. What is being sold, however, is certainly not "jam", or mustard or salad dressing. In an interview with three manufacturers of specialty foods, Chatelaine magazine (April, 1987) quotes Myra Sable of Sable and Rosenfeld describing her business as selling "... a concept - beautiful food, exquisitely packaged and irresistible for entertaining and gift-giving."

The images presented by other products are equally compelling - a folk art image of America in the packaging and promotional material of American Spoon Foods; gracious English tea time in the traditional imported marmalades and jams; the "family tradition" of Matthews 1812 House.

E.1.2. Gift Packs

Most producers of gourmet jams, jellies, preserves, condiments and similar products offer gift packs of various kinds. A review of the differential between wholesale costs of contents and

wholesale costs of the gift packs for three companies (Appendix F) does not indicate major potential for increasing profitability through packaging in this way. One of the companies - Au Printemps Gourmet - does show a sizeable differential, but only in those cases where high cost "packages" - such as well-made wooden boxes - are used. In other instances, the difference amounts to a $2.00 or $3.00, which must provide for the costs of the packaging format -basket, printed box, and so forth - as well as for packing material, labour, and profit. A small wicker basket costs about a dollar and a wooden crate more, so it is difficult to conclude that the mass-produced gift pack approach would offer increased profitability to the Saskatchewan processor.

Very high quality or custom-made products would offer a higher available margin, in theory. However, inputs in this case are, again, costly compared with competitors' products. American Spoon Foods of Michigan, for example, offers hand-made birch bark baskets, large enough for two 284 ml. jars of preserves - for $12.00 Cdn. retail. An equivalent basket from northern Saskatchewan was recently purchased for $15.00 and supply is unreliable.

E.1.3. Packaging

Wild food products from Saskatchewan do not have a strong, clear "image" which would assist in marketing them outside the province, even if it were economically feasible to do so. Poor packaging is partly to blame.

A recent study of the Packaging of Food Products Processed in Saskatchewan (Saskatchewan Economic Development and Tourism) notes that Saskatchewan food processsors do not generally consider packaging to be a major constraint to competitiveness. At the same time, the authors of the report state that:

"(t)his perception may be relative to their knowledge and understanding of what constitutes competitive, consumer orientated packaging. Field observations of packaged products clearly illustrated that, on a national and international basis, existing packaging methods, designs, and visual appeal were lacking." (p. 22)

Part of the general unconcern about packaging may relate to the nature of the food processing industry in Saskatchewan. Up-scale consumer-oriented packaging is not an especially important consideration to meat packers, millers, oil seed crushers. and feed manufacturers who constitute the vast majority of the food processing industry in Saskatchewan. It is an important and expensive consideration in the upscale specialty food business.

Inappropriate labelling further constrains out-of-province and international sales, although this is more a problem of ignorance than cost, and one which the University of Saskatchewan through its FoodTalk program has addressed and continues to address. The Packaging study quoted above notes that smaller Saskatchewan producers generally lack knowledge about regulatory requirements in labelling. (p. 2)

E.2. Promotion and Marketing

The first question a marketer has to consider is "what am I selling?". The wild food industry in Saskatchewan does not seem to have answered that question. All of the following qualities seem to be promoted from time to time but it is not clear which, if any, are meant to carry the main message: Indian culture, "pure and natural" (though not certified organic), good to buy because it helps native people, Saskatchewan grown, homemade, better flavour than cultivated, "souvenir of Saskatchewan", Canadian, northern, rare or unusual. It is also unclear which of these messages, if any, are most appropriate in Saskatchewan and which in other parts of Canada or internationally.
As it appears that both fresh and processed wild fruits are, at current prices and in current quantities, financially viable only within the province, perhaps efforts should first be made to sell the products to a) Saskatchewan residents and b) visitors.
One marketing approach which seems to have been almost ignored, except by Riverbend Plantation, is to capitalize on the "souvenir" trade. Promoting native foods, including wild foods, as an "add on" to tourism industry promotion should be explored. This is done in many areas of Canada, of course, from the sale of B.C. smoked salmon to P.E.I.'s famous lobster suppers.

Improved promotion will not, of course, compensate for excessive production costs.

F. Investment in the Wild Food Industry

The extent of private investment in the wild food industry in Saskatchewan is not readily available, but it has certainly been insignificant in relation to infusions of public funding. Excluding grants and other funds allocated for wild rice and aquaculture, known public expenditures on berry, mushroom and miscellaneous wild products in the north exceed $2,000,000 for extension work, marketing research, product development, travel to trade shows, development of packaging, and other activities. (Source: Saskatchewan A.D.D. Secretariat). This estimate is probably very modest, as federal funding through such

sources as NEDP could not be determined. Nor does this amount include salaries and expenses for government employees who have been active in assisting the development of the industry.

Even at the figure of $2,000,000, government support has amounted to over $10.00 for every pound of berries and mushrooms that has been harvested in the north during the past five years. It should be noted that very little of this money has been for capital expenditures; most of it has been spent for salaries and travel. Over a five year time span, government support for development of northern berries, mushrooms and miscellaneous wild products has been almost ten times the amount of total returns to harvesters.

Little or no government funding appears to have been devoted to development of wild berries or other wild crops in the south. Indeed, wild berry development has been dealt with almost exclusively from a northern perspective, although extension work has recently begun to extend to the forest fringe and northern parklands.

G. Conclusions

The data and analysis provided above have dealt with the commercial feasibility of wild berries, particularly wild blueberries. The same considerations apply equally - and perhaps more emphatically - to other wild crops.

Wild mushrooms, for example, have little fresh market in Saskatchewan, although a few hotel and restaurant chefs have begun to use them in up-scale menu selections. Once picked, they must be processed quickly and quality control is even more important than with other products. The commercial viability of mushrooms is even more dubious than that of wild berries; they are highly vulnerable to weather conditions and most potential pickers are not familiar with them. Unlike berry picking, mushroom gathering is not an indigenous tradition in Saskatchewan. The brief flurry caused by chanterelles in 1987 has not been repeated, partly due to drought.

Other wild products are problematic for a variety of reasons - they are not very common; potential pickers are not familiar with them; there is little or no local market; supply is not great enough to penetrate other markets; they can be supplied more cheaply from elsewhere - together with the universal problem of high transportation costs.

The wild rice industry has not been dealt with in this report, although it is clear that there are many problems with this product as well. Prices have dropped steadily since the early 1980's and crop surpluses from 1988 are still in storage. Although various uses for wild rice are being investigated, it is not evident that additional processing will overcome fundamental problems, including high input costs relative to other producers.

H. Recommendations

H.1. Appropriate supports for a "micro-industry"

Although the economic feasibility of the "wild food industry" appears bleak, it is not the conclusion of this report that the whole endeavour should be scrapped. While it is highly probable that the wild berry resource will never support more than a "micro-industry", it is equally likely that effective small-scale inexpensive initiatives could be taken to support such an industry.

The prime objective of these efforts should be to maximize the income of local harvesters and very small-scale entrepreneurs, such as depot owners, local truckers, and so forth. Consideration should be given to addressing issues such as picker transport, low-cost sales methods such as road-side stands, farmers' markets, and joint ventures with charitable organizations; purchase of freezers and coolers and so forth. Brunner and others have recommended similar initiatives over the years. Micro-loan associations and interest-free lines of credit for depots or producers' cooperatives should also be considered as simple, low-cost methods of financing short term cash requirements. In developing these initiatives, consideration should be given to the expected returns from public as well as private expenditures. Investment in fixed assets should be minimized. It would be the height of folly to support, for example, a freezing or other processing plant which is expected to rely on the wild harvest.

It is impossible to consider northern economic initiatives without considering their social benefits. Support for a small-scale seasonal industry may yield greater dividends than those evident in a straight dollars-and-sense analysis. It is better for people's dignity and well-being, for example, to earn a few hundred dollars than nothing. Unfortunately, the rules governing social assistance are such that most harvesters would have their earnings deducted from their welfare cheques if such earnings were reported. As a result, it is difficult to obtain information from harvesters or to work openly with them, as they are afraid their incomes will be jeopardized.

While it may not be reasonable for particular exceptions to be made for berry pickers, allowing pickers (and other welfare recipients) to average their incomes over two or three months would do much to address the problem as income is earned only in a very short period.

H.2. Assess the potential of native and other fruits on a province-wide basis

Wild berries and other wild edibles have been looked at almost exclusively from a northern perspective. This has been the case even though there are more productive habitats for both wild and cultivated native berries in the forest fringe and parklands.

In the south, there is growing interest in cultivating saskatoons and other small fruits as farmers look for alternatives to their traditional agricultural practices. There are about 85 acres of saskatoons in production now, with considerable potential for expanded acreages. There are also significant constraints to expansion, including very high development costs, limited availability of stock, diseases and insect pests.

It is recommended that before further development of wild or cultivated berries is pursued, a comprehensive feasibility review be undertaken. All the factors involved in commercial feasibility should be identified - technical, economic, human resource and market considerations - and a number of benefit/cost scenarios developed. It should be possible to generate cost and price combinations which would allow potential producers to judge whether various levels of berry production are economically feasible. Similar analysis would assist in determining which types of processing operations (if any) would be viable under various cost/quantity/price scenarios.

H.3. Economic analysis of northern agricultural initiatives

The conclusions reached in this report concerning wild berries apply equally to development of other wild products such as herbs or wild "vegetables". In the past, questions of the availability of particular species or the technical feasibility of managing or cultivating marketable species appear to have dominated research and development activities. In future, a more market-driven approach should be taken. The question to be addressed should not

be "Can it be done?" but "Can it be done profitably?". It is unlikely that Saskatchewan will produce anything that is not for sale somewhere else, and for which market prices are not established. Those prices should be determined and the size of the market ascertained, before substantial expenditures are made toward increasing production. It may be more sensible in many cases to direct incentives toward increased self-sufficiency in food than toward the commercial development of northern agriculture.

Appendix A

Harvester Questionnaire - Fall, 1989

SUMMARY

(responses through Kalya Brunner in discussion with northern harvesters)

1. Sex of Respondent M ___ F x

2. Age Group Under 30 ____

30-50 ____

50+ x - grandmothers are leaders, also take younger women and children and young teenagers

3. Do you usually harvest: alone ____

with family members x

with friends _____ (women friends may pick together)

4. How many days did you go out picking in the summer of 1989

. nil on east side - no berries
. very few days on west side

5. How many days did you go out picking in the summer of 1988

. usually 4 -6 days (weekends) maximum 10 days

6. What do you pick? Blueberries x

Cranberries x

Mushrooms - some/training needed to identify

Other

. occasionally pincherries/raspberries

7. Do you pick for yourself and your family
. satisfy domestic needs first
. immediate and extended family

Commercial sale only _____

Both for your use and commercial sale _____

. pick for friends to buy first, then will sell to depots

8. About how many pounds of blueberries did you and your family pick in the summer of 1989 - about 10,000 pounds total - mostly for domestic use
How many people were picking? 200 - mostly on west side

9. About how many pounds of blueberries did you and your family pick in the summer of 1988? 55,000 lb. commercial - about 10,000 for home consusmption

How many people were picking? 250 -300

10. Do you usually:

. camp out in the berry fields for at least one night?

. a few camp out if fields are 40-50 miles away - perhaps .25 - .33 of all pickers

. drive back and forth every day from the berry fields?
. most go out every day

. sometimes camp and sometimes drive every day _____

11. How far from home do you usually go to pick berries?

Less than five miles _____

Five to ten miles _____

Ten to twenty miles x

More than twenty miles x

12. What is the farthest you would go to pick berries?

Ten miles ____

Twenty miles ____

Fifty miles ____ . 60-90 miles - 1 to 1/2 hour drive

13. What is the least price per pound that you would accept for blueberries? $1.50

14. What is the least amount of money you would have to earn in a day to make it worth your while to pick berries?

. $50.00 -10-12 hour day, yields about $30 net

15. What are the major problems in berry picking from your point of view? Put 1 for important, 2 for not very important, and 3 for unimportant (not a problem):

Transportation 1

Supplies (boxes, etc.) 2

Price too low 1

Crop unpredictable/have to look too hard 1

Not enough places to sell berries 2

Problem with having welfare cut if income reported

. this is the worst problem

Other (explain) _____

Other(explain)_____

16. Other comments _____

_____

Appendix B

Production and Consumption of Fruit and Fruit Products

Figures are not available for production/consumption of wild fruits in Canada, nor for different grades of processed fruits - gourmet jams, for example. The following statistics extracted from the Handbook of Food Expenditures, Prices and Consumption , Agriculture Canada, October 1988 provide some indication of trends in production, imports, exports and domestic consumption.

TABLE A - Fresh Blueberries

YEAR	SUPPLY (kilotonnes)			DISPOSITION (kilotonnes)			PER CAPITA CONSUMPTION (kilograms)
	Prod.	Imp.	Total	Exp.	Mfg.	Waste	
1960	8.85	0	8.85	3.72	2.45	.08	.15
1970	13.07	1.14	14.21	2.11	7.10	.15	.23
1980	13.65	2.19	15.84	2.08	10.99	.08	.11
1986	22.43	3.34	25.77	4.62	15.01	.18	.23

TABLE B - Fresh Cranberries

YEAR	SUPPLY (kilotonnes)			DISPOSITION (kilotonnes)			PER CAPITA CONSUMPTION (kilograms)
	Prod.	Imp.	Total	Exp.	Mfg.	Waste	
1960	.25	1.86	2.11	0	0	.08	.11
1970	2.69	1.5	4.18	0	1.06	.12	.14
1980	5.82	2.73	8.55	0	n/a	.34	.34
1986	n/a	n/a	n/a	n/a	n/a	n/a	.46

PER CAPITA CONSUMPTION
(kilograms)

	1960	1970	1980	1986
All Fresh Fruit	53.84	56.47	60.95	62.66
All Frozen Fruit	1.00	1.41	1.31	.89
Jams, Jellies and Marmalades	2.91	2.25	1.72*	n/a

* 1978 - 1980 not available

IMPORTS
(kilotonnes)

	1960	1970	1980	1986
All Fresh Fruit	750.56	922.39	1246.96	1457.17
All Frozen Fruit	7.27	9.50	11.28	13.60
Jams, Jellies and Marmalades	2.16	2.43	2.90	6.82

EXPORTS
(kilotonnes)

	1960	1970	1980	1986
All Fresh Fruit	63.57	62.02	75.27	85.87
All Frozen Fruit	2.89	8.55	11.69	13.86
Jams, Jellies and Marmalades	.64	2.58	1.06	.90

Appendix C

Potential for Reducing Cost of Berries

The high cost of northern berries is due in large part to hand-picking. Brunner has estimated that if rakes were used, pickers could increase their daily totals from 35 to 75 pounds per day. Rake-harvest would necessitate cleaning equipment however.

Brunner estimated that utilizing rakes and cleaners could drop the picker's price from $1.50 to $1.00 per pound. At this price, the retail and institutional markets for fresh berries would become accessible, as would simple bulk-freezing of surplus berries.

Prices would need to be reduced below $1.00 a pound for industrial uses (juice/concentrate/jams) to be feasible. This is likely not possible without cultivation.

Appendix D

Price Survey

BERRY PRODUCTS AND HONEY - Jams, Jellies, Honey, Honey Blend, Syrups

Source	Product	Size (ml)	Whol.	Retail/Mail Order
Quebec	AU PRINTEMPS			
	Jams			
	Strawberry	125	$1.45	$2.50
	Blueberry	125	1.45	2.50*
	All Reg. Jams	250	2.25	3.60*
	Blackcurrant/ Rum	125	2.00	3.95
	" "	250	3.30	5.30*
	Cherries in Brandy	500	6.50	10.50*
	Cherries in Chocolate Liquer	500	6.50	10.50
	Blueberries in Schnapps	500	6.50	10.50*
Sask.	RIVERBEND PLANTATION			
	Jams			
	Saskatoon	125	2.00	
	"	250	3.25	4.00
	Chokecherry	125	2.00	2.60
	Saskatoon Syrup	150		1. 4.95 2. 3.50
	Saskatoon Topping	500	4.75	1. 8.95 2. 7.20
	Saskatoon/ Honey	125		2.95
B.C.	FORTUNE WEST			
	Wild Jams	28	1.00	1.95
	Honey	28	1.00	1.95
Sask.	NATUREBERRY			
	Wild Cranberry or Blueberry	100	2.00**	1. 4.50 2. 3.50

*Estimated 40% retail markup

Price Survey

Source	Product	Size (ml)	Wholesale.	Retail/Mail Order
Ont.	MRS BROWN Strawberry/ Amaretto	60	1.75*	2.95
	"	250	4.17*	6.95
	STRATHMORE KITCHENS			
	Jams			
	Blackberry	28	.75*	1. $1.25
	Blueberry	70	.90	2. 1.50
	Raspberry	70	.90	2. 1.50
	Strawberry	70	.90	2. 1.50
Ont.	WILDWOOD TREATS Wild Fruit Jams & Jellies			
		125	retail only	1.75
		250		2.95
B.C.	FOUR SEASONS			
	Wild Black-berry	250	3.00	5.00*
	Raspberry	250	3.00	5.00*
	Blueberry/ Napoleon	250	3.25	5.40*
	Hazlenut Honey	250	3.00	5.00*
P.E.I.	P.E.I. PRESERVE COMPANY .Wild Blueberry & Raspberry in Champagne	250	3.25	5.40*
	. Wild Blue-berry & Raspberry	125	2.00	3.33**

*Estimated 40% retail markup

Price Survey

Source	Product	Size (ml)	Wholesale	Retail/Mail Order
PEI	PEI PRESERVE COMPANY (cont)			
	Honey/Grand Marnier	125	2.00	$3.35*
	. all jams	125	2.00	3.35*
	. all jams	250	3.25	4.90*
B.C.	OKANAGAN TREASURE			
	Honey/Fruit Blend	45	.89	2.22*
	"	110	1.58	2.63*
	"	250	2.40	4.00*
Sask.	HONEYWOOD CANDLES			
	Honey	250	1.46	2.43*
	Honey/Royal Jelly	250	5.75	9.60*
(Ont) (Dist)	ENGLISH PROVENDER			
	Strawberry Preserves/ Champagne	250	3.82	6.95*
	Assorted Preserves	28	1.07	1.80*
	WILSON'S GOURMET FOODS			
	Liquer Preserves	227	3.82	6.95*
	Mini-Preserves	42	.79	1.50*
	COUNTRY DIARY PROVENDER			
	Preserves	225	3.82	6.95*
	Honey	225	3.30	5.95*
	Fruit Syrup	150	3.30	5.95*
	Mini-Pres.	42	1.07	1.95*

*Estimated Retail - 40% retail markup

Price Survey

Source	Product	Size (ml)	Wholesale	Retail/Mail Order
?	MOTHER MARTIN			
	Raspberry	225		2.79**
	Red Currant	225		2.59
	Blackberry	225		3.19
	Strawberry	225		2.89
	Black Cur.	225		3.49
Michigan	AMERICAN SPOON FOODS			
	Wild blackberry preserves	284	4.14*	6.90
	Wild Blueberry Preserves	284	4.14*	6.90
	Domestic Raspberry	284	3.78*	6.30
Connecticut	MATTHEWS 1812 HOUSE			
	Wild Blueberry Preserves	284	3.52*	5.88

* Assumes 40% retail margin
** Chain grocery store

Appendix E-1

Selection of Specialty Products Advertisements

Canada and International

Enjoy Fruit Syrups on

- Pancakes
- Waffles
- Ice Cream
- Crepes and in Baking

Packaged in a 341 Summerland Sweets are available in flavours:

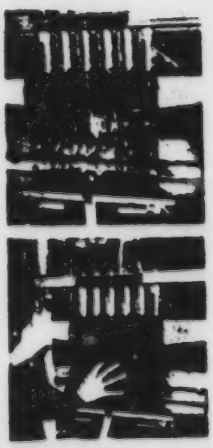
- Blueberry
- Strawberry
- Raspberry
- Apricot
- Peach
- Loganberry
- Blackberry
- Cherry

Start with top quality fruit, then put in 20% more than is required to make fruit jams, add a little pectin, and must ... DO NOT ... PRESERVATIVES ... ARTIFICIAL FLAVOURS ... ARTIFICIAL COLOURS ... result — Summerland Pure Gourmet Fruit ... tastes very fruity because *the fruit is in it!*"

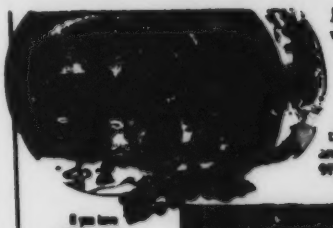
Packaged in a 250 ml Summerland Sweets ... are available in Raspberry, Peach, Cherry, Loganberry, ... rant and Plum, and ... Packaged in a ... tainer are ... Raspberry, Peach and ...

If you are in the Okanagan during July or August, come tour our facilities between 10:00 a.m. and 4:00 p.m. Monday thru Friday.

* * *



Summerland Sweets offers a wide selection of gift packages. All gift boxes are constructed of British Columbia Ponderosa Pine and contain a combination of our fruit syrups and gourmet jams. Available in the gift packages are all of our 341 ml syrups; 113 ml syrups in blueberry, raspberry and apricot; and our gourmet jams in 125 ml containers in blueberry, strawberry, raspberry and apricot. All packages are compact and very convenient for mailing.



Treasure your gifts the wildlife way. Give your home-baked gifts a professional look! Set of 3 tins is perfect for holiday gift giving and will be used again for sewing supplies, knick knacks and personal treasures. Nested tins measure 23 cm. 20 cm. and 18 cm in diameter.
9F28758 Woodland Tins $22.95

A Taste from the Wild. This paper mache duck is filled to the brim with maple syrup, black currant jam, wild rice, rhubarb/strawberry jam, marinated fiddle-heads, maple cream candies, wild blueberry jam, and honey with a wooden dipper. This delightful collection of Canada's best is a gourmet treat for that special someone.
9F27671 Mallard Gift Basket (not taxable) $90.00

EVERY PURCHASE HELPS WILDLIFE

EARLY'S CUPBOARD

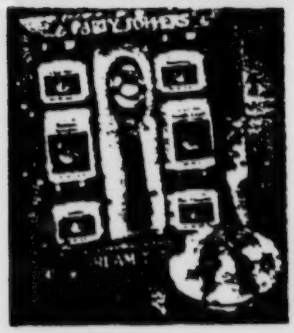
When I was a boy I can remember going to the cupboard to get and choose from a the flavors of country fresh jams and preserves that Mama had canned for us! The choice was always tough because they were all so delicious! We've made it a bit easier for you to order, but the selection is still gonna be tough because there're all so good! Mix 'em, match 'em and make up your own favorite four pack. Select from Strawberry, Blueberry or Pure Fig Preserves, Red Pepper Jelly, Damson Plum, Apricot, Blackberry or Boysenberry Jam, Strawberry, Rhubarb Preserves, Raspberry, Rhubarb Jam, Green Pepper Jelly or Healthy, our delicious Pear Preserves. Then make the perfect gift.

Item #1561 (Early's Cupboard - 4 10 oz. jars assorted and mailed) Delivered $11.95

COUNTRY BUTTERS

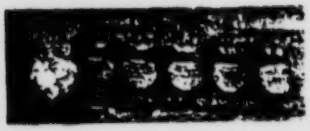
These delicious Country Butters are made from only the finest and freshest fruits available. Scotch simmered to taste tempting perfection, so rich and good, just as Grandma used to make 'em! We have a selection of four 8 oz. jars that you'll love. There's Mango Peach, Apricot and my favorite, Apple Cherry Butter Spread. Try one, or better yet, try all four! These yummy butters will truly complete any country breakfast.

Item #1561 (Country Butters - 4 8 oz. jars) Delivered $11.95



382 ICE CREAM SET

392 ICE CREAM QUINTET

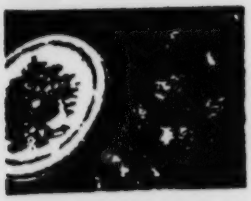


14 ORCHARD PICK

185 SMALL FRUIT BASKET

111 GRAND FRUIT BASKET

7028 PECAN CLUSTERS



Order Gift 163 $26.50

Order Gift 165 $31.95

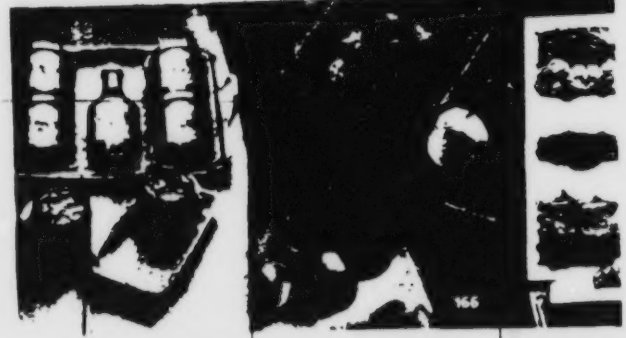
Prettt as a picture and twice as good, these Australian Glazed Apricots are dipped in rich, dark velvety Chocolate

Order Gift 166 $21.50

Order Gift 40

The same, bu

Order Gift 40



You won't believe the flavor in this 6 Jar Basket of Pure Oregon Fruit Preserves!

Order Gift 50 $26.95

Orange Apricot Syrup

Order Gift 51 $25.50

Enjoy real old fashioned Fruit Preserves.

Order Gift 54

$17.95

Candied Cota Prunes.

Order Gift 161

...y the luscious fruits of summer. ...very finest preserves ever! Chunks of real ...ricots, blueberries and raspberries are in ...delicious sweet preserves (25% more fruit ...most other preserves). Delicious toppings for ...muffins or pancakes!

842 – 22 oz. Strawberry $6.95

843 – 22 oz. Raspberry $6.95

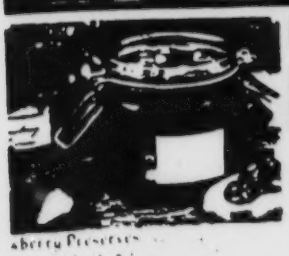
844 – 22 oz. Blueberry $6.95

SAVE $4.00

T 847 – All 3 flavors in 22 oz. tubs $16.95

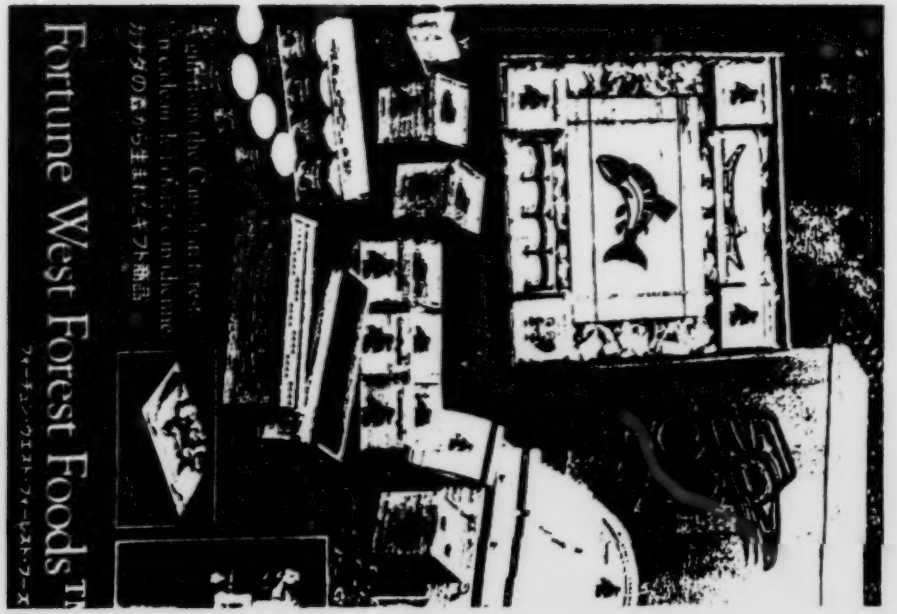
None of the the most flavorful preserves ever in 2½ oz. tubs

GIFT 848 $7.95

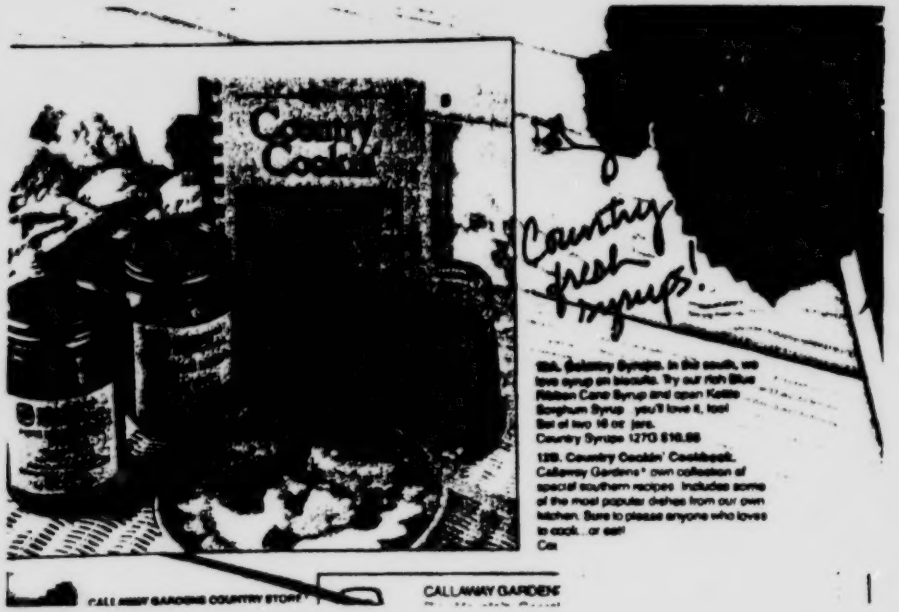


aberry Preserves

Berry Basket


Fortune West Forest Foods

of the
Preserves


Country
Cookin'
Country
fresh
syrups!
CALLAWAY GARDENS

ns, Preserves and Canned Fruit

gic Pectin Mix

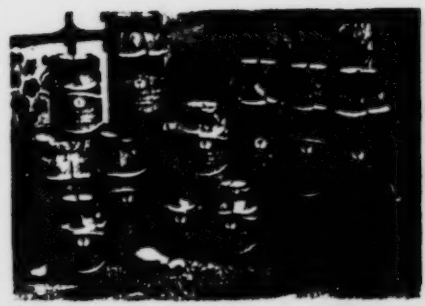
(Iberyl) Pectin. For sugarless popular product allows you to jiffy without a lot of boiling to have a much fresher taste' for home use only. With each 8 enough for 30 pints) comes 1 m phosphate (from phosphate s sales calcium, which activates . Refrigerate jelly after open- time.

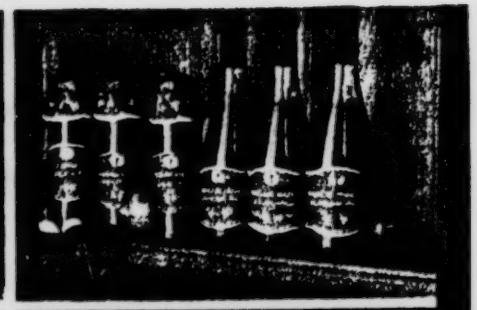
(1 lb.) 14.79 (8 oz.) 10.15

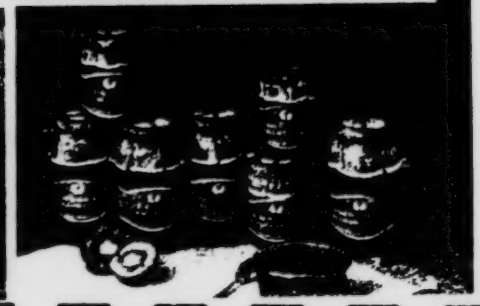
Walnut Acres Canned Fruit

unusual varieties is there are. The Apple

Pumpkin Butter. A unique product. About the best of its type we have tried. Use as a spread on toast, with yogurt or cottage







Wild Fruit Preserves & Jellies

Hand-picked wild fruits from the forests, pine barrens & dunelands of Northern Michigan.

FLAVORS

Wild Blackberry Preserves
Black jewels from woodland trails in the countryside outside Petoskey.
Pantry 21 ... 10-oz. ... 5.75

Wild Blueberry Preserves **(Available in July)**
Frosty low-bush berries from the pine barrens bordering Lake Superior.
Pantry 22 ... 10-oz ... 5.95

Wild Elderberry Jelly
Umbels of tiny purple fruits that grow in open wetlands. A flavor mysterious in its complexity like a well aged wine.
Pantry 23 ... 10-oz. ... 6.00

Wild Grape Jelly
Small purple clusters of tangy grapes picked in the dunelands bordering Lake Michigan.
Pantry 24 ... 9-oz. ... 6.00

Wild Thimbleberry Preserves
(Available in late July)
Velvety, salmon colored berries with a tart flavor reminiscent of currants & raspberries. The soft seeds release their unique nutty flavor when chewed. From the cool, rugged coast of Lake Superior along Michigan's Upper Peninsula.
Pantry 19 ... 10-oz ... 8.25

Birch Bark Baskets

BIRCH BARK BASKETS

These unusual baskets are made for us by U.P. (upper peninsula) fisherman Jim Tinker. They are extremely popular gift containers that become beautiful plant holders and centerpieces. Because of the infinitely varied patterns and shades of bark used, no two baskets are alike.

One-Jar Birch Basket
Measures 5½" × 3¾" × 3¾"
Pantry 92 ... 4.75

Two-Jar Birch Basket
Measures 6" × 4¾" × 7"
Pantry 62 ... 10.00

Oval Birch Basket
Measures 11" × 5" × 6"
Pantry 59 ... 15.00

Large Oval Birch Basket
Measures 16" × 7½" × 7"
Pantry 80 ... 22.00

Birch Bark Birdhouse
Measures 7" × 6"
Pantry 61 ... 9.50

ıifts of Food from American Spoon

An American Spoon Assembly

A selection of some of our most popular products in a Folk Art Gift Box:

Strawberry-Rhubarb Preserves, 10-oz.
Blueberry Spoon Fruit,® 9-oz.
Dried Red Tart Cherries in a Gift Box, 6-oz.
Plum Catsup, 15-oz.

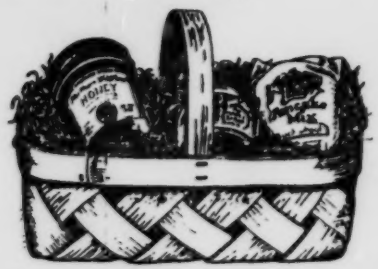
Gift 779 ... 26.00 delivered
Add $2.00 on orders west of the Rockies.

:et Thoughts

lhing in this thoughtful assortment has ır added. It's a naturally sweet way to ı the best of everything to those who :h their sugar intake. In a Folk Art Box:

.arry Forgione's Barbecue Sauce, 12-oz.
.arry Forgione's Corn Relish, 8-oz.
-our Cherry Spoon Fruit,® 9-oz.
Blueberry Spoon Fruit,® 9-oz.
Oven-Baked Apple Butter, 9-oz.

t 758 ... 30.00 delivered
$2.00 on orders west of the Rockies.



Breakfast Basket

A wonderful pancake mix and two naturally delicious toppings, packed in a woven basket.

Northern Lites Buckwheat Pancake Mix, 1-lb.
Michigan Maple Syrup, 8-oz.
Northern Wildflower Honey, 11-oz.

Gift 713 ... 18.00 delivered
Add $2.00 on orders west of the Rockies.

a Large Folk Art Gift Box ıws this lovely painting of wild berry pickers against the hilly landscapes of lichigan farms and forests. It's the perfect package for our handmade products. ıchigan artist Sheila Burns composed the scene of this riginal painting from fond nories of her grandfather's orchards and gardens. Special gift selections packaged in the Folk Art Gift Box are featured throughout the catalogue.

Very Cherry Basket

The finest cherry products from the "Cherry Capital of the World." In a hand-crafted Birch Bark Basket:

Dried Red Tart Cherries in a Gift Box, 6-oz.
Sour Cherry Spoon Fruit,® 9-oz.
and a Cherry Wood Jelly spoon.

Gift 735 ... 23.50 delivered
Add $2.00 on orders west of the Rockies.

Our small Folk Art Gift Box bears this whimsical depiction of a winter park scene by Michigan artist Sheila Burns. We will have a new, small Folk Art Gift Box with a summer orchard scene ready for Summer '89 gift giving.

Fruitlands Box

Reflecting a fruitful harvest, this American Spoon selection of wild and cultivated dried and preserved fruits will capture the fancy of fruit lovers. Packaged in a Folk Art Gift Box:

Wild Blackberry Preserves, 10-oz.
Peach Preserves, 10-oz.
Sour Cherry Spoon Fruit,® 9-oz.
Raspberry Butter, 9-oz.
Dried Red Tart Cherries, 6-oz.
Dried Cranberries, 6-oz.
Dried Wild Blueberries, 4-oz.

Gift 755 ... 40.00 delivered
Add $2.00 on orders west of the Rockies.

Call our Toll Free Number
800-222-5886

Wild Berry Gift Pack

Packaged in a small Folk Art Gift Box:

Wild Elderberry Jelly, 10-oz.
Wild Blackberry Preserves, 10-oz.

Gift 702 ... 16.00 delivered
Add $2.00 on orders west of the Rockies.

A Taste of Michigan

A selection that says "A gift from Northern Michigan":

Blueberry-Lime Preserves, 10-oz.
Northern Wildflower Honey, 11-oz.
Dried Red Tart Cherries in a Gift Box, 6-oz.
Michigan Maple Syrup, 8-oz.
and a cookie cutter in the shape of Michigan's lower peninsula.

Gift 714 ... 25.00 delivered
Add $2.00 on orders west of the Rockies.

Ganache Sour Cream Pound Cake

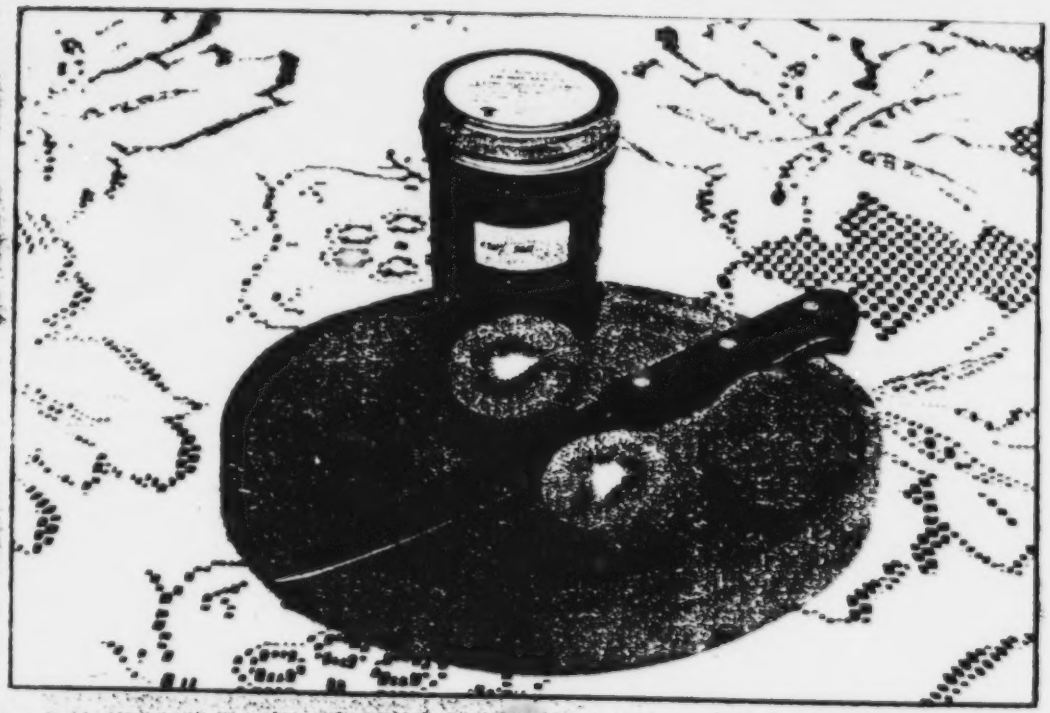
Since we met Jane Davis, owner of Ganache Bakery in Evanston, her bakery was rated "best in Chicago" by the Chicago Tribune. Anyone who has eaten a Ganache cake would concur with their choice. The fresh ingredients and loving attention to detail make Jane's Sour Cream Pound Cake, adapted from her grandmother's recipe, very special. This "tea" cake is loaded with kirsch-soaked dried cherries and, of course, that makes it special for us. It arrives in its own Birch Bark Basket.

Gift 738 ... approx. 9-oz ... 17.50 delivered
Add $2.00 on orders west of the Rockies.

Appendix E-2

Selection of Saskatchewan Products

Mercer River Rice Ltd.
Northern Lights
WILD RICE PASTA
SEASHELLS



Gloria's Low-sugar Jams:

When it comes to berry-picking, technology can't improve on the efficiency of the Rock family. Paul and Gloria have been dragging up berries across southern Saskatchewan and Alberta since childhood, and today they and their three children pick enough berries in one weekend to artfully bulk their humble appetites and that of their customers, as Walter Rock says.

It was this efficiency, in fact, which led them to their current business. Their annual harvest of wild strawberries and high bush cranberries left them with a surplus of pectin-rich fruit, which they cooked up into jams and jellies, they gave them away as gifts.

When they discovered a market for low-sugar preserves, they set up a booth at Agribition and the Regina Farmer's Market. Their customers were so enthusiastic, they followed them home.

The popularity of their product, says Rock, is due to its high fruit content, low sugar — about half as much as regular jams and jellies — and its freshness.

Harvest Pie Company:

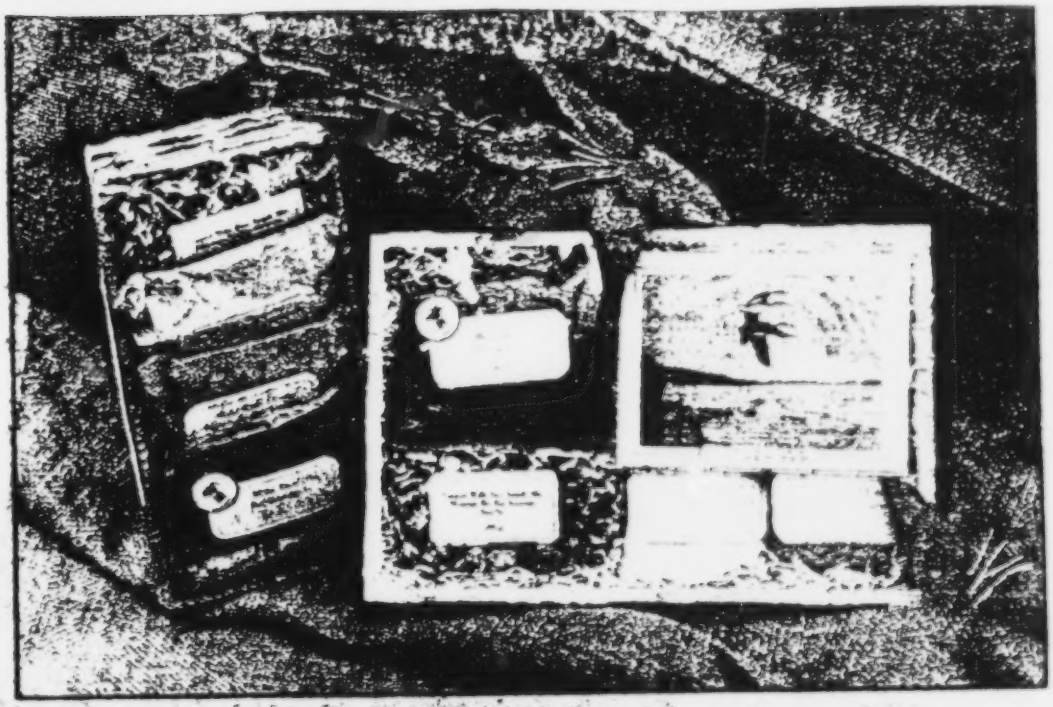
Some people say Candice Sotropa has a lot of crust. It may be a poor joke but it reflects an impressive fact: she makes 60 to 75 pies a week. She can make 24 pies in an hour. She even enjoys it.

As the chief cook and bottlewasher of Harvest Pie Company of Pangman, Sotropa buys 5,000 pounds of frozen saskatoons a year, prepares the pies, freezes them in her five deep freezes, and sells them to five Regina restaurants.

It all started when a friend offered her and her husband 800 pounds of saskatoons and her husband, who'd been in the restaurant business, suggested she make pies for this market. Because she'd been looking for a home-based business, she took up the challenge.

Then, as if this and the family bed-and-breakfast enterprise weren't enough, she took up jam making.

Another of her products is Wild Onion Mustard. But this is her husband's baby. He had discovered the plant on school field trips and experimented with it.



Rus-tuk Enterprises:

Brenda Emiech arrived in Lac Seul as a conservation officer eight years ago. Today she is an entrepreneur, the founder and owner of Rus-tuk Enterprises. Linking these two disparate occupations is another of her interests: basketweaving.

"I was doing basket weaving, and a workshop on wild rice products asked me to make some gift baskets for a presentation at an upcoming conference. That prompted me to try the business of wild rice packaging and marketing myself, and things just snowballed to the point where I had to stop making the baskets and buy them instead."

The establishment of this cottage industry has been a learning process, says Emiech. Buying in bulk from different northern producers, she packages the wild rice pancake mix and flour and the popped wild rice snack by hand. And because wild rice is such a quality product, she says, the packaging must be of an equally high standard.

Appendix F

Sample Costs - Gift Baskets

Supplier	Product	Wholesale	Retail	Cost above Contents (Wholesale)
MICHIGAN SPOON FOODS				
	. Birch Basket and one jar fruit preserves (Jar and Basket - 7.20 Wholesale)	$9.70*	$16.20	$2.50
	. Fruit butter assortment in folk art cardboard box (Jars - 11.30 Wholesale)	14.04*	23.40	2.70
	. Very Cherry Basket (Contents & Birch Bark Basket - $15.00 wholesale)	17.00*	28.20	2.00
	. Wild Berry Gift Pack in Folk Art cardboard box (Contents - 8.40 Wholesale)	11.52*	19.20	3.12
RIVERBEND PLANTATION*				
	. Gift basket with Saskatoon jam, honey spread, chokecherry jam in straw basket with few candies (Contents - est. $7.25 wholesale plus basket)	8.75	12.50	1.50
	. Gift basket with 2 125 jams and 1 250 ml. wild rice (Contents - $6.50 wholesale plus basket)	8.00	10.80	1.50

. Two jams plus topping (Contents $8.75 wholesale plus basket)	10.00	15.00	1.25

* Retail prices at the store surveyed were relatively low. Another shop carried Riverbend Products at about 25% higher retail, although it did not have any gift baskets for comparison.

AU PRINTEMPS GOURMET

. Shaker Box Assortment - preserves and condiments (Wholesale contents - $10.75 in wooden "shaker" box)	17.25	28.75	6.75
. Pine Hamper (wholesale contents - $27.00 plus hamper)	45.50	75.80	18.50
. Hatbox Jam Collection (wholesale contents - 8.70 - 7 125 jams)	12.50	21.00	4.00
. Gift pack - 3 jams (250 ml) - $6.00	7.00	11.65	1.00

. all prices Canadian - assumes 20% above U.S. prices

Appendix G

Interview List

Kalya Brunner, Agrologist
Prince Albert

Jim Bogard, Manager
La Ronge Business Resource Centre
Economic Development and Tourism

Yvonne Boy
La Ronge Business Resource Centre (Co-ops_
Economic Development and Tourism

Bernie Zuk
Saskatchewan Research Council
Saskatoon

Nicholas Lowe
Department of Applied Microbiology and Food Science
University of Saskatchewan
Saskatoon

Judy Russell
Saskatchewan FoodTalk
University of Saskatchewan
Saskatoon

Gordon Sellar, Resource Consultant
Saskatoon

Jack and Brenda Emisch
Rus-Tuk
La Ronge

Eldon Neufeld
Riverbend Plantation
Saskatoon

Irene Chernoff
Buy Saskatchewan
Regina

Dave Sims, Ron Lind and Janet Ai
A.D.D. Secretariat
Agriculturé and Food
Regina

Jack Stabler, Head
Department of Agricultural Economics
University of Saskatchewan

Del Bain
Development Coordinator
Program and Projects Division
Economic Development and Tourism

Marion Gracey
Executive Director
Youth Unlimited
Regina

Marion Wilson
Trade Commissioner
International Trade Development Branch
External Affairs
Ottawa

Betty Thauberger, Acting Manager
Craft Business and Marketing Association of Saskatchewan
(CBMAS)
Saskatoon

Nelson Barsi
Trade Officer Food
Trade Promotion Branch
Trade and Investment
Regina

Don Rugg, Director
Marketing Division
B.C. Ministry of Agriculture
Victoria, B.C.

Dave Shambrock
Business Development Manager
Canadian Food Products Development Centre
Portage La Prairie, Manitoba

Len Filek, Plant Manager
Summerland Sweets
Summerland, B.C.

Paul Roch
Gloria's Low Sugar Jams and Jellies
Regina, Saskatchewan

Candace Sotropoa
Harvest Pie Company
Pangman, Saskatchewan

Fiona Matthews
Project Development Coordinator
Saskatchewan Rural Development

Margaret Kerridge, Manager
The Showcase Gallery
Chemainus, B.C.

Note: The majority of interviews with Saskatchewan producers and marketers were carried out by the Business Consulting Service, University of Saskatchewan . Report attached as Appendix H.

THIS REPORT HAS BEEN PREPARED BY BUSINESS CONSULTING SERVICES
OF THE COLLEGE OF COMMERCE
UNIVERSITY OF SASKATCHEWAN
SOLELY FOR THE USE OF
MITCHELL CONSULTING ASSOCIATES

ANY REPRODUCTION OF THE REPORT WITHOUT THE EXPRESS
CONSENT OR KNOWLEDGE OF MITCHELL CONSULTING ASSOCIATES
OR BUSINESS CONSULTING SERVICES IS PROHIBITED

TO THE CLIENT

Business Consulting Services of the College of Commerce, University of Saskatchewan, would like to thank you for allowing us the opportunity to do consulting work for your firm. We trust that the following data summary will satisfy the contract made between our firms and hope that the information contained in the report will be as useful to your organization as it was intended.

Doug Kalesnikoff
Faculty Director
Business Consulting Services
College of Commerce
University of Saskatchewan

TABLE OF CONTENTS

	Page
WILD FOODS	1
Wild Berries	2
Berry Production	2
HARVEST SEQUENCE	3
OVERVIEW OF THE WILD FOOD INDUSTRY	4
Wild Berries	10
Wild Blueberries	11
Wild Mushrooms	13
QUESTIONNAIRE TO SUPPLIERS AND/OR MARKETERS OF WILD FOODS	14
RESPONSES FROM THE SURVEY	18
RETAIL STORES VISITED IN SASKATOON	25
Mass Market Retailers	25
Specialty Stores	27
Western Development Museum	27
The Trading Post	29
The Homestead	31
Sangster's Health Foods	31
Indian Trader	32

WILD FOODS

The true definition of the terms "organic", "natural" and "chemical free" must be clearly understood and strictly adhered to in order to receive accredited certification as "wild food". If this is attained through the correct channels, it could increase revenues by 25 to 30 percent if these definitions are utilized correctly.

As the wild harvest industry develops, the market will develop a variety of new products. The volume of these products will also increase. Value-added processing can be of particular value to wild food products, which will enhance the marketability for an older product. This will result in new market appeal which may cater to new market segments.

The "wild foods" product category includes the following commodities that can be used by Mitchell Consultants:

- Wild Berries
- Wild Mushrooms
- Wild Rice
- Smoked Rainbow Trout
- Wild Herbs
- Wild Shellfish (freshwater clams and crayfish)
- Fiddleheads
- Cattail Rhyzome
- Other Edible Wild Flowers and Grasses (from northern forest areas)

Wild Berries

Northern Wild Berries	Availability (fresh)	Quantity* (lbs.)
Saskatoons	Mid-July to Mid-August	5,000
Blueberries	August to Mid-September	50,000
Lowbush Cranberries (Vaccinium vitis-idaea)	September-October	20,000
Bog Cranberries (Vaccinium macrocarpon)	September-October	1,000
Highbush Cranberries (Viburnum trilobum)	September	5,000
Raspberries	Late July to Early August	3,000
Strawberries	Late June to July	1,000
Chokecherries	August	5,000
Pincherries	August	2,000
Cloudberries (Rubus chamaemorus)	August	very limited
Currants	August	1,000

* Quantities available are only estimates and are variable due to weather conditions. Quantity will also be dependent upon prices paid to pickers.

BERRY PRODUCTION

			Depots	
1985	3000 lbs. (mostly blueberries)	$2.50/lb	1	$ 7,500
1986	9000 lbs. (mostly lingonberries)	$2.50/lb	4	$22,500
1987	36000 lbs. (mostly blueberries)	$2.50/lb	22	$90,000
1988	information not available			

The wild blueberry harvest in Eastern Canada runs over 50 million pounds annually.

	Average Harvest	Acres Harvested
Nova Scotia	70 million lbs.	26,000
New Brunswick	7 million lbs.	
Newfoundland	1-6 million lbs.	21,000
Prince Edward I.	700 000 lbs.	

Saskatchewan's climate closely parallels that of Newfoundland's. The main difference between Saskatchewan's harvest and the harvest in Eastern Canada is that Saskatchewan berries are picked by hand instead of by rakes.

Saskatchewan has experienced annual crop failures of 30 to 40 per cent per year due to spring frost, drought, etc.

Most of Saskatchewan's prime berry producing lands are located adjacent to roadsides (one-quarter mile on either side); and on forest fire burn areas. These lands provide the best potential for blueberry production in Saskatchewan.

HARVEST SEQUENCE

MAY	JUNE	JULY	AUGUST	SEPTEMBER
Verpas			Chokecherry	High Bush Cranberry
Gyromitras			Saskatoon berry**	Lingonberry
Morels			Raspberry	Rose Hips
Fern Fiddleheads			Chanterelles	Pincherry
			Pine Mushrooms	Blueberry*

All of these wild foods are picked wild and sold to collection depots.

*Most intensive levels of management are needed when a wild plant is introduced into a cultivated field system. This usually results in higher yields, but higher capital inputs are needed. Saskatoon berries are cultivated near Saskatoon and in Alberta.

**Minimal effort is required to manage existing stands of wild berries, ferns, and mushrooms in order to increase the yield (through irrigation, weed and insect control, etc.) and to ensure a harvest (frost and drought control). Wild blueberries are the only Saskatchewan crop managed this way.

OVERVIEW OF THE WILD FOOD INDUSTRY

Minimal inventory is necessary because production has been low and the supply is immediately liquidated by the demand. There is no stockpiling in this industry. However, there are considerations concerning the environmental and ecological impact on wild food harvesting.

The price of the raw blueberry (lowbush) product is such that any processing costs added to the purchase price of the product tend to almost price the end product out of the market. Therefore, producers are attempting to access the gourmet food market where they can realize 25 per cent over retail grocery prices. Grading of the berries may also assist in realizing higher margins.

Blueberries could be marketed as organic or naturally grown. They would have to be certified as organic. By emphasizing the stronger flavour of the naturally grown products, it may be possible to generate a local market for Saskatchewan products. However, it would be impossible to compete with Eastern Canadian producers, who are able to produce their crop for as little as 65 to 80 cents per pound.

Some harvesters of wild berries are also involved in the marketing end of wild berries. They are also involved in the processing of these berries to producing jams and jellies. People in the industry refer to this as "self marketing".

As production of such processed wild foods increases, there will be an increasing need for an organized distribution system.

There is modest consumer interest in these products. However, in order to be successful in the mass market, a distribution system must be set up. (because consumers have asked where these products can be purchased).

People involved in the wild food industry were talked to by Business Consulting Services. Bill Plunz of the Saskatchewan Wild Rice Council, Bernie Suck of the Saskatchewan Research Council, and Gerry Ivanochko of the Department of Agriculture were all talked to regarding the wild food industry.

Saskatchewan Wild Rice Council

Bill Plunz

The supply of wild rice last year was 1.8 million pounds (900,000 pounds of finished rice). At this point in time this year's crop promises to be better than last year. This year, the crops in southern Manitoba and Ontario are poor.

Also competing in the wild rice market is the United States. They grow paddy rice as opposed to wild Canadian Lake rice. It is of poorer quality and has is smaller. It is often mixed with Canadian wild rice to improve its appearance. It can be grown at about 500,000 to 600,000 pounds per acre, as opposed to Canadian lake rice produces a yield of 150,000 to 300,000 pounds per acre. The costs of producing paddy rice per acre are not much higher, thus Canadians have to compete. There needs to be differentiation as to size, odour, appearance, and taste.

For gift packs, the longer, larger sized rice will be desired. The shorter the rice the shorter the cooking period.

Price is directly proportional to the grade, volume, and form desired. Canadian lake rice is packaged in 80 pound bags. Saskatchewan marketers must buy a minimum of 160 pounds at $3.00 per pound. The price drops considerably with the volume purchased.

Price definitely is not static. A more reliable and useful price can be estimated by the end of September of October, when volumes produced are known, competition from the United States has been assessed and demand is more readily apparent (through orders, etc.).

Thus, for gift packaging, there shouldn't be a problem with supply.

Bernie Buck
Saskatchewan Research Council

There is a very limited amount of processed wild food products. The wild food product most easily available in Saskatchewan is blueberries. Blueberries are processed but the amount is limited. This year is poor so the supply will be very limited. Presently, there is no existing infrastructure to handle this product or similar products. There is a consultant in Prince Albert (Gordon Sellar) who is attempting to organize the industry.

There is a supply of locally grown products available but it is severely limited. This is because these products have a short growing season, complicated by factors such as the weather. There is a problem with storage and cleaning of the product, then processing and marketing the product before it spoils. This short shelf life results in higher costs. Locally, wild berries that are available are:

- Saskatoons
- Raspberries
- Strawberries
- Chokecherries
- Cranberries

However, none of these berries are processed for commercial use (if they are it is on a very small basis). Most of the processing in this area originates from a home canning type environment.

Nature Berry, Inc., from La Ronge, are the only people who process commercially. Their main products are wild cranberry and blueberries marketed in a syrup form. Their products include such things as gift packs and are internationally marketed.

Rustuk Enterprises from La Ronge also market gift packs which include a number of products from Northern Saskatchewan. (e.g. writing paper, etc.)

With respect to the demand side of the market there is considerable demand in a lot of outlets for such a Saskatchewan type of product. It is a relatively new industry ready for growth and expansion. There are a growing number of firms marketing "gift food packs". However, the supply side of the

market is unstable. There is no infrastructure or organization of suppliers. there is very little commercial activity, processing or harvesting. However, there is a growing interest in this industry - supply and demand related.

Mona Foods in Edmonton either process (by drying) or sells fresh Saskatchewan grown berries and mushrooms.

The Root Cellar in Prince Albert may be another source. Len Donais is the contact. He works as a distributor of these products from the North.

Fiddleheads and cattails are becoming more popular and are targeted to a niche market.

The organic market represents a large potential market. If marketed properly, this could represent the marketing theme. This is due to today's movement towards the natural and wholesome eating habits. One must be extremely careful when employing such a classification as the distinction between agricultural and organic. There is a very fine line. It is a sensitive issue so beware of labelling — the certification of organically grown products is very rigid. **Note:** Northern grown products are usually insecticide free but one must also beware of the mercury content. Although this mercury content may be high, it is caused by natural means.

With respect to distribution, there is no consistent or guaranteed supply of wild food products. This eliminates the option of using a distributor or wholesaler since they usually require certain quantities within certain time frames. This would be next to impossible to meet given the present infrastructure.

The main distribution channels employed are farmer's markets. This is a very good starting point especially for small processors. It is a relatively inexpensive process as well as an educational step. Marketing wild food products at a farmer's market would suffice as a test market where the producer/processor would get an idea of the products acceptability and a target market. this type of activity would give the processor good marketing experience in that they would deal directly with the consumer in such a way as to get some direct feedback. This could lead to product improvements aimed to

satisfy the target market which is critical in a growing industry with a new product.

The next step would be to establish a supply sufficient for a distributor to consider and perhaps even market the product in retail outlets such as Safeway. One could achieve this end by improving the supply by employing more controlled and protective agricultural means (irrigation, planting, etc.).

Another avenue to explore and pursue would be to form an association or group of harvesters to supply distributors. This may prove to be more difficult as people balk at the thought of lost independence in marketing their product. However, in the long run such cooperation would be ideal.

Gerry Ivanochko
Department of Agriculture, La Ronge (425-4403)

Suppliers:

1. Nature Berry
   - Cranberries, blueberries, preserves, and jellies
   - Mushrooms
   - Wild rice (processed to pancake mix)

2. Rustuk Enterprises (La Ronge)
   - gift packs

3. Canadian Wild Rice
   Lynn Riese
   - puffed wild rice trail mix
   - it is processed further such that it is cooked in oil and then is mixed with wild nuts and berries to form a trail mix.
   - it is a new concept and they are still ironing out the details

Wild rice is generally processed as a pancake flour mix. Secondary processing is popped rice and they are also investigating pre-cooked rice. They hope to pre-cook it in order to reduce the cooking time which is ordinarily quite long.

The reason suppliers are very secretive is that there is an extremely small profit margin in the industry and they are cautious. They don't want to reveal anything for fear that the idea may be stolen, and that people may go after the market themselves, or go closer to the source.

Generally, for all northern forest products, the supply is very tenuous. The quantities available vary drastically from year to year. For example, 50,000 pounds of blueberries were harvested last year, and this year less than 10,000 pounds were harvested. The outlook for other berries are similar, except this year's harvest promises to produce even less compared to last year.

Mushrooms have only been grown and developed in the past three to four years. So far, there has only been one good year which yielded 50,00 pounds of chanterelles. There are other possibilities with other types of mushrooms, including pine and morels. This hasn't yet been pursued, thus there is no forecasted quantities available.

Competitors:

Mona Foods (Edmonton)

Gala Foods (Calgary)

Due to the demand for the product, marketing operations may have to expand to include international markets. Many of the other companies have done this merely to make a go of it. There is a large demand for these products, especially wild rice, overseas.

There is a small profit margin because the wild foods are very expensive to produce. Price and supply are very volatile.

One may investigate other markets. It is much cheaper to buy blueberries, and other wild foods, from another area such as the Maritimes. This is because the foods are cheaper. Saskatchewan is more expensive because of the lack of mechanization in harvesting, transportation costs, and much lower volumes.

To effectively market Canadian Lake wild rice it must be clearly identified and distinguished from other types of rice (ie. paddy rice). Emphasis must be put on the organic and natural growing methods (free of pesticides, insecticides, etc.).

Wild Berries (various)

Product Source/sources: Numerous locations across the northern forest zone

Possible End products:

i) Wild Berry Pie Fillings

ii) Packaging to extend product shelf life

iii) Wild Berry Perogies

Initially it would be advisable to develop a limited product line of 3 or 4 different berries.

Pie Filling:	Possible Combination Lines
*Blueberry	*Blueberry/Raspberry
Pincherry	*Cranberry/Blueberry
*Raspberry	Blueberry/Cranberry/Pincherry
*Saskatoon	Saskatoon/Cranberry
Chokecherry	Blueberry/Chokecherry/Cranberry

* indicates suggested first development product options

Research that is still required for the marketing of these products are:

Size of package - packaging research to extend shelf life

Product development - by working together with a local baker to develop other products.

Promotion - image of natural ingredients/no additives/harvested in Northern Saskatchewan (can be on package)

Price - Based on cost (cost oriented pricing)

Distribution - ??

Alternatives for Distribution

Mass Market (supermarkets)

Mail Order (depends on packaging)

- cheap way to advertise

Specialty Market (gourmet/specialty shops)

- gift stores

Whatever the method of distribution, it must be supported by a sound promotional strategy that will get consumers to demand and then buy the product.

Wild Blueberries

Product Sources: Northern Forest Areas (burnt over areas and clear cut growth)

Possible End Products:
1) Jams, Jellies, Conserves
2) Juice and mixed juices
3) Dried Blueberries (snack food, cereals, baking)

Alternatives:

CONSUMER MARKET

Any further processing of the raw product adds costs to the purchase price of the product, which would price the end product out of the market (because of small volumes, thus the lack of economies of scale)

By accessing gourmet/organic food markets, one can add 25 per cent over the retail grocery shelf prices.

Grading blueberries may help overcome this problem (of pricing it out of the market), but the implementation of such a grading system would increase costs, thus increasing the price of the end product to the consumer.

INSTITUTIONAL MARKET

Dried wild blueberry can be used in baking mixed (to be sold to retailers, and also to catering establishments such as donut shops)

They would also be marketed to breakfast cereal producers, for a reasonable price. As the cereal would have to be mass produced, the image of being natural may be tarnished. As well, cereal producers would only purchase dried wild blueberries if the price was low enough for them to make a reasonable profit margin. Also, the marketability of such a product would have to be taken into consideration.

JUICES

In Saskatchewan, high prices are paid to harvesters ($1.25 to $1.50 per pound), whereas in Eastern Canada, harvesters may receive 25 to 30 cents per pound. Obviously, it would be impossible to be a competitive supplier in Saskatchewan when Eastern Canadian producers are better able to supply the processors with cheaper berries.

Wild Blueberry Sauce (for use in ice cream and cakes, etc.)

Again, production would not be feasible due to the high cost of the raw product.

Eastern Canadian experts in the blueberry industry advise that Saskatchewan may be able to generate a local market for Saskatchewan products. However it was already mentioned that it would be impossible to compete with Eastern Canadian producers, who are able to produce their crop for as little as 65 to 80 per pound. Therefore, it is necessary that in Saskatchewan we focus our efforts on developing the fresh berry markets before going into the processed wild food market. This allows the producer of the raw product time to achieve lower per unit cost of production, which will enable them to compete with other markets.

In order for processed end products to be certified as organic, it must be processed without additives. Such certification is becoming a prerequisite classification for most products sold on the natural foods/organic product markets. Thus, any value-added processing or packaging should only be undertaken to maintain its natural food classification.

WILD MUSHROOMS

Production in Saskatchewan

1985	3,000 lbs.
1986	2,500 lbs.
1987	65,000 lbs.
1988	10,000 lbs.

In 1987, 50 000 pounds of Chanterelles and Pine Mushrooms were harvested. They were purchased by Mona Foods and Nature Berry; for $2.00/lb ($100,000)

Wild Mushrooms (varied species)

Source: Scattered areas throughout most of Northern Saskatchewan
Remoteness: would have to dehydrate mushrooms at depots

End products:
1) Dehydrated Wild Mushrooms
2) Packaged as separate species or mixed packs

1988: Berry buying depots were becoming interested in handling wild mushrooms.

To date, only two commercial buyers are actively buying wild mushrooms in Saskatchewan, and this is likely to increase soon.

Packaging whole dehydrated mushrooms poses problems, as they are likely to get crushed when distributed. Wild Mushroom soup mix could be done with relative ease.

QUESTIONNAIRE TO SUPPLIERS, MARKETERS AND/OR SUPPLIERS

HELLO, MY NAME IS _____ AND I'M CALLING ON BEHALF OF BUSINESS CONSULTING SERVICES FROM THE COLLEGE OF COMMERCE, UNIVERSITY OF SASKATCHEWAN.

I AM DOING A PROJECT FOR A COMPANY INTERESTED IN FACILITATING THE MARKETING PROCESS OF WILD FOOD PRODUCTS.

MAY I HAVE 5 MINUTES OF YOUR TIME TO ANSWER A FEW QUESTIONS?

____YES

____NO (COULD I CALL YOU BACK AT A MORE APPROPRIATE TIME?)

(IF THEY INSIST ON THE CLIENT'S NAME IT IS MITCHELL CONSULTANTS AND THE FIRM WILL BE CALLED NORTHERN HARVEST ENTERPRISES)

We are mostly interested in assisting existing companies market processed wild food items. Wild foods in gift presentations alone or in combination with craft items as a form of packaging.

The purpose of this study is purely informational and will be used only to assess the market and needs of existing companies. Your name and number will not be released or used in any way for solicitations.

We are aware that a limited marketing system already exists and we would like to further the growth of the industry to the national and international level (eventually).

We would like to increase awareness of these types of natural, organic products through a more concentrated effort involving various people and brand names.

Questions

1. What products in the wild food line do you process and/or market?

2. At what level of processing?

_____ Processed_____

_____

_____

_____ Raw Goods (suppliers.. go to Question 7)

3. a) Do you market your own product?

_____ No. Why not?
How is your product marketed?

_____ Yes. By whom?

b) Where is this line marketed?

_____ locally at farmers' markets

_____ trade shows

_____ retail outlets

_____ health food stores

Other... please specify _____

_____

c) To what extent is this line marketed?

_____ locally

_____ Saskatchewan

_____ Western Canada

_____ Nationally

_____ Internationally (countries?_____

_____

_____)

4. I am aware that this industry is risky and that is varies from season to season. In a normal year what types of volumes could be expected? (i.e. Is this a large volume industry?)

5. What types of volumes do you foresee in the next three to five years?

6. How does this compare to industry demand?

Presently?

In the future?

Go to Question 8.

7. Is your product sold in its raw form or processed further?

_____ raw form >> Do you package and market your own product?

_____ NO >> Who does? _____

_____ YES << Go to Question 3. >>

_____ processed further >> By whom? _____

8. Do you make available any information concerning the wild foods that your business is involved in?

(pamphlets, brochures, price lists, cost lists, information concerning the market or customers, etc.)

_____ NO

_____ YES (Could you send the information COD as soon as possible?)

THANK YOU VERY MUCH FOR YOUR TIME AND ASSISTANCE.

RESPONSES FROM THE SURVEY

La Ronge Indian Band

They deal mostly with wild rice, but some of the band indians are presently involved in berries and mushrooms, as well as a limited amount of fish.

These people also process a complete line of wild rice:

Packaged wild rice
Wild rice mixed with brown rice
Pasta mix
Wild rice pancake mix

They also market these products themselves. They are marketed across Canada, as well as the United States (Florida, Colorado, Washington and California). Overseas, they market these wild rice products primarily to Germany in Europe. They are presently pursuing markets in Japan.

The La Ronge Indian Band does not use a wholesaler or a broker. With the product, there is a very low consumer awareness and there are not many, if any, brokers who know enough about the industry or who are competent enough to market the wild rice products properly.

This line of wild rice products is marketed primarily in the United States, since the United States represents 90 to 95 per cent of the market. It is marketed to the consumer through medium sized food chains.

In a normal year, approximately 1.8 million bushels of wild rice is produced overall (industry wide). This is not a lot when speaking of mass marketing.

They expect the production volumes of wild rice to increase as technology and crop management systems improve. Ontario and Manitoba experience wide fluctuations due to water and weather problems.

Presently, there is not enough supply to meet the demand. This has been accomplished through such promotional tactics as attractive packaging, and cooking instructions and recipes included with the product.

The P. Hockin Distribution Company
Saskatoon, Saskatchewan

They are a small distribution company (supplier), that exclusively deals in wild rice in its natural form. This is done in bulk, or in jars. They do not do any value added processing. They sell wild rice in its raw form.

They market the wild rice themselves, through friends and business acquaintances. The wild rice is marketed in Saskatchewan, British Columbia, Alberta and Ontario.

They have found that the market in Saskatchewan is lacking, especially as a tourist or gift item. When retail outlets were approached they generally were not interested in carrying these products.

This company has been in operation for about 14 months, and are still very small scale. It was difficult for Hockin (Pamela) to say except that she did not handle large volumes.

As far as promoting her company, Pamela uses the generic advertising provided by the Canadian Lake Wild Rice Association, stamped with her name and address.

She seems to be very interested in working with other people that would enhance the marketing process of wild rice. (i.e. Feel free to call her again)

Brian Hoffart
Green Lake, Saskatchewan

He mainly produces wild blueberries for market. He is also involved in strawberries (primarily for personal consumption), and cranberries (however this year there were none). He mentioned mushrooms, but he is not really into it yet.

Mr. Hoffart markets his blueberries in its raw form.

He markets his own product, primarily through his store in Green Lake. The blueberries are targeted mainly towards tourists. He also markets these blueberries to Saskatoon and Meadow Lake, or wherever anyone is interested in carrying them.

He does not use a marketing intermediary, as it would not feasible in this area of wild foods because the season is very short (approximately two weeks).

His production of blueberries this year was 800 pounds. He considered this year to be very slow as there were no cranberries or strawberries. Thus, he considered 1989 to be a very poor year.

He believes that the industry demand is there if one can produce and deliver the product.

Aqualand Industries
La Ronge, Saskatchewan

Aqualand processes and markets their own wild rice. The extent that it is processed is that the wild rice is dried and hulled. No further processing is done.

They market their wild rice locally, in Saskatchewan, Canada, the United States, and in Europe.

In 1988, they produced 2.1 million pounds of wild rice. Even though this company is small, they are a significant contributor to the wild rice industry.

Aqualand estimates that the volumes should increase by about 25 per cent over the next three years. They feel that supply is just meeting the demand, and if the demand increased, there would be an insufficient supply of wild rice. They don't want to see the industry grow too fast. They also feel that government intervention is not needed.

The Aqualand representative was very unwilling to part with any specific information. She was interested enough to request more information on Northern Harvest Enterprises. She especially wanted Darcy's address. She did not want to send any information when she discovered that Business Consulting Services was doing consulting work for another agency other than the University.

Mona Foods
Edmonton, Alberta

Mona Foods buys wild mushrooms from suppliers in Saskatchewan (no names were given). They process and market two types of wild mushrooms, oyster and shekati mushrooms. These wild mushrooms are sold fresh (in season), and dried (out of season).

Mona Foods does not market their own products directly. They make use of wholesalers. These wholesalers market these wild mushrooms and other food products (primarily berries) internationally.

They target the mass market, institutional market, and the gourmet/specialty market. They utilize different wholesalers for each of these markets. They also make use of a distributor. The names of these wholesalers are confidential, and she (the secretary) does not have authorization to release that information.

Any information regarding the volumes that Mona Foods handles is strictly confidential. However, she did say that volumes were very unpredictable, as supply is good only if the weather cooperates.

She would not give any further information, because any other information is confidential, even to potential customers.

Ken and Pat Auckland (Pat)
La Ronge, Saskatchewan

They are entrepreneurs in the wild rice industry in Saskatchewan. The were the first people to ever do any value added processing to Saskatchewan wild rice. Previously, all wild rice was shipped by truckload (raw) to the United States (primarily to Minnesota) for processing.

Ken and Pat presently grow their own wild rice, and they process and package it themselves. Products include wild rice, wild rice flour, and wild rice pancake and waffle mix.

Ken and Pat market their own products, directly to stores or chains of stores, as well as to bulk food stores. They prefer higher volumes, but they will handle smaller volumes. Their direct marketing efforts accounts for about 30 per cent of their sales.

Ken and Pat also sell to wholesalers. These wholesalers are then responsible for distributing it to the end user. Sales to wholesalers account for approximately 70 per cent of their business.

Ken and Pat's products are marketed primarily to retailers (large and specialty retailers), as well as to the commercial market (hotels and restaurants).

Geographically, most of their products are marketed within Canada (Saskatchewan, British Columbia, and Ontario). The United States, Switzerland, the United Kingdom, and South Africa also purchase wild rice products from them (via wholesalers).

Some of her comments on the wild rice industry:

In Saskatchewan, wild rice harvesting was started by the white population, however native peoples are also involved in the industry today. this is quite different than in Manitoba where it was started and has remained primarily with the natives.

The price of wild rice is increasing dramatically now and will continue for awhile. This is because many people who have entered the industry were in it

to make quick profits. These people have now put themselves out of business by selling wild rice to consumers at wholesale prices. These people have put the wild rice industry in a state of chaos. However, the industry is now rebounding to where it should be. She is optimistic that the industry will get even better - both profit-wise and volume-wise.

RETAIL STORES VISITED IN SASKATOON

Mass Marketers

Safeway
Super Valu
Co-op

Specialty Stores (Gift shops)

The Homestead
Indian Trader
Western Development Museum Gift Shop
The Trading Post
Bountiful Baskets

Specialty Stores (Health Food)

Nature's Health Centre
Sangster's Health Foods
Mom's Bulk Foods

Mass Market Retailers

At the Co-op, Safeway, and Super Valu, wild rice is the only type of wild food that is marketed to consumers. At all three supermarkets, 200 gram packs of "Black Gold" Wild Rice is sold for $4.49. Black Gold wild rice is distributed by Lakeview Distributing of Saskatoon. Black Gold also has a brown and wild rice mixture (500 grams) selling for $2.98 per pack. A 500 gram pack of long grain and wild rice mixture sells for $2.75 per pack. These are packaged in clear plastic packets with black and yellow lettering.

Rice-a-Roni also has a long grain and wild rice mixture (124 grams) that sells for $1.39 per box. Even though this is not in the "wild food" category, however, they should be considered as competition. The packaging is done in the typical Rice-a-Roni box format.

Uncle Ben's also offers a long grain and wild rice mixture, that sells for $1.89 per 200 gram pack. The packaging is also done in the typical Uncle Ben's box format.

Black Gold wild rice and Black Gold wild rice mixtures use the larger sized lake wild rice, while Rice-a-Roni and Uncle Ben's use the paddy rice that is grown commercially in the United States.

At Super Valu, wild rice is sold under two other brand names besides Black Gold. Indian Head wild rice (lake rice) sells for $2.99 per 200 gram pack. Indian Head wild rice is distributed by Lac du Bonnet of Manitoba. Paddy wild rice is also sold under the President's Choice label, which sells for $1.79 for 170 grams. This is packaged in a large plastic spice jar. This is distributed by Sunfresh Foods.

There are no gift packs offered at these supermarkets. Other pure jams are offered that may be suitable for gift packages. However, at the present time, no gift packages are offered. These jams are offered by mass marketers, such as Smucker's, which has blackberry jam that sells for $1.99 for a 250 ml jar. Co-op offers a pure strawberry jam that sells for $3.05 per 500 ml jar.

At Safeway, Mother Martin's offers a whole line of jams in 225 ml jars. These jams are raspberry ($2.79), red currant ($2.59), blackberry ($3.19), strawberry ($2.89), and black currant ($3.49).

Cereals with blueberries and apples are sold at the Co-op. These cereals are in clear plastic jars with a screw-on plastic lid. Kavanagh Foods of Coquitlam, B.C., offers this Greenaway Gold Label Canadian Crunchy Cereal in a two pound container (907 grams) for a retail price of $4.39.

Specialty Stores

Two types of specialty stores were visited; health food stores and gift shops. Health Food Stores were more likely to carry wild rice, while gift shops were more likely to carry wild berry jams and gift packs. Only two gift shops had any type of gift packages available to the consumer. The Western Development Museum Gift Shop and The Trading Post carry jams and jellies in gift packages. They also sell these products individually. These two stores also had the largest variety of wild food items, with both of them carrying wild rice and wild berry jams and jellies, as well as syrups and pie filling.

The mass retailers do not carry any "wild" berry jams and jellies, but they do carry pure jams that could be considered as competition for wild berry jams that are not sold in gift packs. It is also possible for these larger companies to offer their jams in gift packs.

Western Development Museum

Nature Berry, a competitor that Business Consulting Services attempted to talk with, has two processed wild berry products on the market. Canadian Wild Cranberries and Canadian Wild Blueberry Mint are sold in 100 ml jars for $4.50 each at the Western Development Museum. These same products are sold at Mom's Bulk Foods in Saskatoon for $3.50 each. These jams are sold in glass jars with a white plastic lid. The cranberry has a red and gold paper foil label, while the blueberry mint has a blue and silver paper foil label. There is Indian writing on the labels, as well as English. These products are not sold in gift packs at the present time.

Nature Berry also has wild rice products in the Western Development Museum Gift Shop. Their wild rice, which is packaged in a 12 ounce burlap bag, sells for $7.25. Twelve ounces (340 grams) of wild rice flour sells for $7.50. The flour is packaged in a plastic-lined white cloth bag. The bag has artwork of a Canada Goose coloured in Indian Red. Nature Berry's Pancake and Waffle Mix also comes in a 12 ounce white draw-sack. It sells for $6.95. The Pancake and Waffle Mix bag has blue printing on it. These products are sold by themselves. They are not included in any gift packages.

Other products at the Western Development Museum include the "Au Printemps Gourmet" line of foods (see brochure). There are three sizes available within this line; 100 ml, 250 ml, and 500 ml jars. These jars have a dull blue paper cover. Products within the Au Printemps line that may compete with wild foods are; Cherries in Chocolate Liqueur (500 ml), which sells for $10.50; Raspberry Vinegar (150 ml), which sells for $4.95.

The Western Development Museum also carries the Au Printemps line of jams. These jams are packaged in jars with the fruit patterned lids. The strawberry jam (125 ml) sells for $2.50, and the black currant jam with rum (125 ml) sells for $3.95.

Another brand in the Western Development Museum Gift Shop is Mrs. Brown's strawberry preserves with amaretto. It is packaged in glass jars with a metal lid (white with red and light brown polka dots). It has a foil label with brown tones and red printing. They come in two sizes - 60 ml ($2.95) and 250 ml ($6.95). Strathmore Kitchen offers a small jar (28 ml) of blackberry jam for a retail price of $1.25.

There were no gift packages of wild berry products in the Western Development Museum Gift Shop. There were some jams that came in six packs, but they were all of the same variety.

The Trading Post

The Trading Post primarily carries "Riverbend Plantation" products. All are similarly styled with gold metal lids on jars with a paper label. The label is white with green and purple printing. They syrup bottles have small plastic twist caps.

Wild Berry Products that the Trading Post carries:

- Saskatoon Berry Sweet and Sour Sauce (250 ml) $5.00
- Saskatoon Berry Jam (250 ml) $4.00
- Saskatoon Berry Pie Filling (500 ml) $7.20
- Chokecherry Jam (125 ml) $2.60
- Chokecherry Syrup (150 ml) $3.50
- Saskatoon Berry Syrup (150 ml) $3.50

Gift Packs (Riverbend Plantation products)

1. Gift Basket (yellow plastic straw with some candies amongst the straw, plastic wrapped)

Three products:

- Saskatoon Berry Honey Spread (125 ml)
- Saskatoon Berry Jam (250 ml)
- Chokecherry Jam (125 ml)

Price: $12.50.

2. Gift Basket (same type as #1)

Three products:

- Chokecherry Jam (125 ml)
- Saskatoon Berry Topping (250 ml)
- Saskatoon Berry Jam (125 ml)

Price: $15.00

3. Gift Box (White cardboard box packed with natural looking straw)

Four products:

- Saskatoon Berry Sweet and Sour Sauce (250 ml)
- Saskatoon Berry Jam (250 ml)
- Saskatoon Berry Topping (500 ml)
- Saskatoon Berry Pie Filling (500 ml)

Price: $35.00

Other products sold at the Trading Post include:

Strathmore Kitchen Preserves (straight jars with gold metal lid and paper label)

- Blueberry (70 grams) $1.50
- Raspberry (70 grams) $1.50
- Strawberry (70 grams) $1.50

WILD RICE (Riverbend Plantation)

- Packed in a clear plastic "ziplock" bag with an oval sticker on the bag.

Price: $4.00 (8 ounces)

WILD RICE FLOUR (Riverbend Plantation)

- Packed in a clear plastic "ziplock" bag. Paper label with Black and White printing.

  Price: $3.75 (350 grams)

The Homestead (Market Mall)

The Homestead gift shop also carries Riverbend Plantation products. The products are listed below:

- Saskatoon Berry Topping (500 ml) $8.95 ($7.20 at Trading Post)
- Saskatoon Berry Honey Spread (125 ml) $2.95
- Saskatoon Berry Syrup (150 ml) $4.95 ($3.50 at Trading Post)
- Chokecherry Syrup (150 ml) $4.95 ($3.50 at Trading Post)

Other products:

- Wild Blueberry Tea $7.95 (jar about 4 inches tall with a wooden spoon and cork)
- Charles Dickens' Jams (a variety)
  Glass jars, colourful labels (40 grams) $1.98 each

Sangster's Health Foods (Market Mall)

- Black Gold Wild Rice (200 grams) $5.95 ($4.49 at supermarkets)
- Vita-Health of Winnipeg - Brown and Wild Rice Mixture
  Plastic bag, green and yellow label (400 grams) $2.49
- Whole Earth brand

  Blackberry/Apple Melange (330 ml) $4.79

  Blueberry/Apple Melange (330 ml) $4.79

Indian Trader (Market Mall)

- Maple Orchard Farms (Ontario)
  Pure Strawberry Jam (250 ml) $5.99

- Muskoka (Ontario)
  Black Currant Jam (500 ml) $23.50

- Grey Owl Wild Rice (454 grams / one pound) $10.95
  - includes recipes
  - packaged in a plastic tub, similar to containers used for salads at McDonald's.

BIBLIOGRAPHY

Aiken, S.G. et al Wild Rice in Canada NCC Press Limited, Toronto

Bartholomai, Alfred, Ed. Food Factories: Processes, Equipment, Costs, 1986

British Columbia. Ministry of Agriculture and Food. Food Processors Source Book, 1988

Brunner, K. ERDA Contract 1.4.28 - Wild Plant Harvesting, Interim Report (provided by K. Brunner)

Canada, Consumer and Corporate Affairs.Guide for Food Manufacturers and Advertisers

Canada. Industry, Trade and Commerce. "A Market and Technical Survey of the European Blueberry and Native Berry Industries" 1976.

Engineering Management Services Croscan Ltd. Study on the Packaging of Food Products Processed in Saskatchewan

Hardigree, Peggy. The Mail Order Gourmet, St. Martin's Press, New York, 1983

Harvest Foods Limited, "Saskatchewan's Food and Beverage Industries - Past and Future Developments", 1986

Kramer, Dee. "Popular Organics" Harrowsmith Vol. XIV:2, Number 86, July/August 1989

Lopez, Anthony. A Complete Course in Canning, Volume II, Chapter 10, Jellies, Jams and Related Products The Canning Trade, 1975

No Author Cited (obtained from K. Brunner) "The Lowbush Blueberry Industry in Nova Scotia", "The Newfoundland Blueberry Industry", "Partridgeberry Industry

Stabler, Jack C. and Eric C. Howe. "Socio-Economic Transformation of the Native People of the Northwest Territories, 1800-2000" 1989

Stabler, Jack C. "Dualism and Development in the Northwest Territories", Economic Development and Cultural Change, July 1989, Vol 37, Number 4

Saskatchewan. Economic Development and Trade. "Industrial Opportunity Profile - Food Processing" 1984

Saskatchewan Indian Agriculture Program. ADF Project V-87-09-0134, Report, 1989 (G. Sellar)

S.I.A.P. ADF Project V-87-06-0116 (K. Brunner)

University of Saskatchewan,Department of Applied Microbiology and Food Science. "New Product Taste Panel" (Project publication), 1988

Winchell, E.H. and R.P. Dahl. Wild Rice: Production, Prices and Marketing, 1984, Agricultural Experiment Station, University of Minnesota

Periodicals

Chatelaine, April, 1987

Gourmet Magazine (various issues)

Western Grocer (various issues)

Food Service and Hospitality (various issues)

Western Producer, August 17, 1989

Organic Gardening (various issues)